QUEST
INFORMATION SYSTEMS

State of Washington, **Office of The Secretary of State,** **Elections Division**	December 1, 2014

Quest Response to RFP NO. 14-13

PROJECT TITLE: ELECTIONS BUSINESS ANALYSIS & BUSINESS REQUIREMENTS

PROPOSAL DUE DATE: December 1, 2014

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3.1 LETTER OF SUBMITTAL

QUEST
INFORMATION SYSTEMS

December 1, 2014

Ms. Kim Wyman
Secretary of State
Legislative Building
P.O. Box 40220
Olympia, WA 98504-0220

Re: RFP NO. 14-13
Elections Business Analysis & Business Requirements

Dear Ms. Wyman:

Quest Information Systems, Inc. (Quest) appreciates the opportunity to submit a response to RFP NO. 14-13 for Elections Business Analysis and Business Requirements. The accompanying proposal responds to the objectives and requirements identified in the RFP.

Quest is prepared and qualified to deliver a quality, cost-effective, analysis that leverages proven success in developing, delivering, supporting and maintaining statewide voter registration systems, campaign finance systems, and other mission-critical information technology projects in the public and private sectors. With over 18 years' experience implementing and managing election-related solutions in 7 states, Quest is confident our team is well suited to deliver services that satisfy Washington's specific requirements as described in the RFP.

Quest acknowledges that we understand and comply with the information presented in the RFP, specifically:

- Quest is in receipt of the RFP and addenda 1, 2 and 3;
- Quest is able and willing to provide deliverables that meet the requirements identified in RFP NO. 14-13;
- Quest has included, as required in Section 3.1, the requested information regarding the Consultant and its subcontractor, GCR in Attachment B at the end of the proposal;
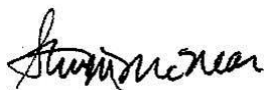
- Quest filed a registration with the OSOS on 11/20/2014 to renew the company's account and was assigned UBI #603-454-203;
- Quest will apply with the Department of Licensing, using the above UBI number;
- As part of the OSOS registration process, Quest submitted a Certificate of Existence/Good Standing from the Indiana Secretary of State Office;
- Quest has signed the CERTIFICATIONS AND ASSURANCES document, Attachment A, which is included with our response.

The proposal that follows this letter is formatted in strict compliance with RFP NO. 13-14 instructions.

As CEO, I am the authorized representative, signatory, and principal contact for this proposal. For convenience, my contact information can be found below my signature. I certify that this proposal meets all general conditions of the RFP and related addenda.

Quest is enthusiastic about the opportunity to work with the State of Washington, Secretary of State, to apply our considerable knowledge and expertise to conduct a comprehensive analysis of Washington's current election system, elicit requirements for a future election system and develop recommendations for a new election system based on the State's requirements. We will leverage our experience with 3 state election and voter management systems, while considering new ideas and technologies to assist the Washington election officials envision and document an election system that exactly meets the State of Washington's needs

Sincerely,

Steve M. McNear

CEO
smcnear@questis.com
Phone: 317-806-8821
Fax: 317-806-8821

3.2 TECHNICAL PROPOSAL (SCORED)

A.   Project Approach/Methodology

Quest Information Systems, Inc. is pleased to provide this response to the Washington Secretary of State's RFP NO. 14-13 for Elections Business Analysis and Business Requirements. Quest possesses extensive breadth and depth of experience, knowledge and subject-matter expertise in election systems and software ranging from all facets of voter roll management to online voter registration, mobile VR (Indiana Voters and Geaux Vote), electronic pollbooks, election night reporting, GIS-capable election systems and campaign finance.

In the remainder of section A. Project Approach/Methodology, we describe Quest's proposed project approach and provide an overview of qualifications and experience.

Project Approach/Methodology

Quest proposes an approach in which the elections business is divided into Subject Areas, with teams assigned to evaluate and gather requirements for each Subject Area. The results will feed into an integrated future state recommendation for the OSOS. The executive sponsor and the service delivery manager will maintain continuity across all Subject Areas and among the teams while remaining focused on common goals among the various Subject Areas. Quest believes election business requirements demand an integrated solution that provides the OSOS and counties an end-user and voter-centric view. This vision should be a central theme for all future system planning.

Quest possesses a wealth of relevant experience and expertise which we describe in greater detail later in this section. Using a team of elections and technology analysts and practitioners, many with more than 10 years experience, Quest will apply the appropriate subject matter expertise to each subject area in the elections analysis and business requirements engagement. The Quest project management team will guide business analysts and subject matter experts to integrate their findings into a cohesive, comprehensive requirements-driven plan that will serve as the basis for the development of an RFP as well as the design and development of a new elections system.

Quest proposes that Jim Stewart manage the overall project. Jim is an executive with the company and has over seven years of voter registration and election related experience. As an experienced project manager he has conducted numerous feasibility studies and requirements gathering efforts in his career. Jim will leverage Quest's project management methodology which is based on the Project Management Institute (PMI)'s approach to concepts and methodologies for requirements gathering and assessments. Jim is a graduate of the Stanford Advanced Project Management program.

A key feature of our approach is the inclusion of Quest subject matter experts for each Subject Area:

Wendi Mott will be utilized as a Subject Matter Expert. Wendi is a business expert with extensive experience leading requirements and detailed design activities for Voter Registration in both Indiana and Virginia. Wendi has extensive knowledge of all aspects of Voter Registration business processes, with specific experience with voter registration management, absentee processes, and election management including offices, candidates and measures/petition management. As the Software Quality Assurance lead for Indiana and Virginia, Wendi led a team of 9 people that performed QA testing on both projects. She led the Virginia implementation training, including the development of training materials and performed State and Train-the-Trainer training classes. She participated in all Indiana VR system design sessions, reviewed requirements, and designed screens/process flows to meet requirements. In her ongoing Business Analyst role, Wendi works closely with the Virginia Department of Elections business analysts to elicit, vet, estimate and document enhancement requirements for the continuous evolution of the VERIS statewide voter registration system.

Kelly Sprague will be utilized as a Subject Matter Expert. Kelly is a business expert with extensive experience leading requirements and detailed design activities for election related projects in Indiana. Kelly has extensive knowledge of the state and local election processes, with a specific emphasis on working with local officials to address the needs of county offices both large and small. She was the County Coordinator overseeing training for 92 Indiana counties and was an invaluable contributor in software design sessions for Indiana. In her ongoing role as Indiana SVRS Proficiency Management Lead, Kelly works with state and local election officials to ensure the elections community maintains proficiency with SVRS.

James Darrah Ph. D. will be utilized as a Subject Matter Expert. James has over 9 years of voter registration and election experience working on the Louisiana election system – ERIN. Dr. Darrah was the project manager and principle system architect for ERIN. He was a member of the requirements team that documented the legacy system functionality and the new system requirements. He designed the new ERIN system database, functional architecture, legacy data migration and validation, startup procedures and system integrity validation. He managed the technical staff and oversaw project quality control and testing, and was the principal communicator with the client. James will be subcontracted from Quest's partner GCR.

In addition to the subject matter experts named above, Quest will utilize our Business Analysts to elicit feedback from the state and local staff. Darrin Snider, Kristin Arabally, and Matt Hazard, will work within the Subject Area teams to document current and future state requirements through in person interviews, online meetings, and the documentation that they produce. Each brings a diverse and extensive background with over 40 years of combined experience. Kristin will be subcontracted from Quest's partner GCR.

For the technical review, Quest will draw on the database expertise of Kevin Reid, Voter Registration DBA, and the software knowledge of Cory Biggs, Senior

Voter Registration Software Developer, both of whom have 10 years experience working with HAVA-compliant statewide voter registration systems. Mike Cameron will fill the role of Software Architect and will review the overall system design.

Quest Qualifications and Experience

Founded as an Indiana corporation in 1989, Quest Information Systems provides election solutions and services to state governments in support of HAVA-compliant voter roll management and related information systems as well as campaign finance disclosure reporting. Since 1996, Quest has assisted state election departments with program management, eliciting and documenting requirements, facilitating election community change management at both the state and county levels, designing, developing, implementing and managing voter registration systems designed for election officials as well as citizens who access public web sites via widely-adopted browsers.

The Quest team of voter registration subject matter experts, election specialists and technology professionals has more than 75 years of collective experience implementing and supporting voter registration software solutions designed specifically to comply with HAVA, NVRA, UOCAVA, MOVE and other relevant election laws. Since 2005, our voter registration support team has managed HAVA-compliant systems in Indiana and Virginia, each of which is based on a common framework customized to meet the unique requirements of each state and designed specifically to comply with the Help America Vote Act (HAVA) of 2002. In addition to common voter registration and management functions, Quest-supported solutions include *public web sites for voters, online voter registration (OVR), electronic poll book, redistricting, election management (EMS), poll management, and correspondence management, as well as document scanning and barcoding*.

To complement and extend the subject matter expertise of the Quest team, we are partnering with experts from GCR to offer the State of Washington an even broader perspective on HAVA-compliant voter registration systems based on 3 state systems with very different and unique requirements. We have a highly qualified team of voter registration subject-matter experts and software developers dedicated to supporting our state elections customers and managing voter registration application software – serving end users, answering questions, solving problems, modifying software, managing requirements, planning releases, managing enhancement projects, and ensuring the success of voter registration and elections for our customers. From the support staff to the CEO, we are singularly focused on supporting, serving and satisfying voter registration customers.

The following statistics illustrate the scope of the Quest team's voter registration services:

	IN	LA	VA	TOTAL
Precincts	5,378	4,018	2,432	11,828

Registered Voters	4,554,289	2,914,172	5,281,078	12,749,539
End Users	500	250	500	1,250

Unique qualifications that make Quest the best choice to evaluate, analyze and document election-related solutions include:

- Voter registration subject matter experts versed in HAVA, NVRA, UOCAVA, MOVE, other relevant election laws, elections technology and processes. Quest SME's possess more than 10 years experience supporting and working closely with elected state officeholders, election officials, executives, state and county staff as well as other election community stakeholders and constituents.
- Business Analysts and Project Managers with decades of experience eliciting business requirements for complex technology systems, conducting system analysis and effecting process improvements. Quest BA's and PM's have successfully documented business requirements which have been used since 2005 to design, develop, implement and enhance HAVA-compliant voter registration systems in 3 states.
- Software specialists' expert with the technologies on which real world voter and election solutions are based, and with newer technologies such as mobile applications and geographic information systems (GIS).
- The proven ability to apply the above attributes and experience to effectively and efficiently manage day-to-day operations, while anticipating changes due to legislation and changing conditions.
- Quest management and staff collaborate with state and county election officials on a daily basis. Moreover, state customers ask Quest to present key topics at statewide conferences for election administrators and county clerks. Periodically, we meet with Secretaries of State to collaborate on election systems strategic direction, present process improvement ideas and assist with developing budgets and rationale for desired legislative actions.
- Quest's core business is implementing, supporting, managing and consulting on voter registration and similar election software solutions.

Quest's FirstTuesday® election solutions are complemented by a number of services that allow customers worry-free outsourcing for day-to-day information technology management. These include cloud-based managed hosting, application support services including help desk, software support and maintenance (Tier 1, 2 & 3), software customization, application release management, proficiency management, and, program/project management.

Quest implemented and still manages all components of Indiana Statewide Voter Registration System as a single comprehensive program for voter roll management. The following list of accomplishments illustrates the breadth of voter registration services Quest provides:

- A private, secure statewide network restricted to election officials in 92 counties

- Application and database hosting services
- Installed PCs, printers and scanners in 92 counties
- Scan more than 3,000,000 Voter registration cards and signatures for all 92 counties
- Converted data from 92 county VR databases into a single, statewide voter database
- Statewide SVRS Help Desk supporting 500 users
- Elicited and documented requirements from officials from the Secretary of State's office, the Indiana Election Division and county representatives.
- Designed, developed and configured SVRS application using FirstTuesday® software
- Host, enhance, train, maintain, and support SVRS for 10 years
- Established Proficiency Improvement initiative for SVRS users
- Provide ongoing Program Management, Business Analysis and Technical Project Management.

In addition to the FirstTuesday® Voter Registration solution, Quest offers FirstTuesday® Campaign Finance to support electronic filing and publishing for 6 states, including Alabama, Colorado, Indiana, Maine, Oklahoma and Rhode Island.

Under post-implementation maintenance and support contracts, each state has continued to turn to Quest to realize the potential of their election solutions, enhance the software to satisfy changes in the law and user needs, provide customer support and service to the state election community, and provide consultative thought leadership to evolve the state's election solutions. We work hard to ensure we continue to earn the trust of our customers. We invite you to ask our references why they chose Quest as their partner to develop, implement and manage critical solutions.

Quest fully understands and appreciates the need to document the current state of voter registration and election management in the State of Washington to best discuss and communicate a coherent future state vision. The goal is not just to replace what you already have, but to identify opportunities to improve processes and identify the best solution for state and local users of the system as well as the voters of the State of Washington.

The Final Deliverables will include sufficient detail and business justification to support a legislative budget request and to effectively communicate your needs to the vendor community that might provide services and solutions, Quest has the experience and knowledge to ensure our mutual success.

B.   Work Plan

Analysis Approach

During the various analytical activities within the project that will result in the required deliverables, the team will collect findings, record requirements, describe processes, and document findings and recommendations so they can be compiled into a set of documents that the OSOS team can use to meet the State's goals and evolving needs – acquiring and/or developing new systems and processes, then establishing scope for a project to implement them.

The election system analysis will be accomplished by 3 teams, each of which will focus on specific Subject Areas whose components support a common elections business function or whose functions imply a natural grouping. Analysis teams will review all available materials that describe the current systems, interview state and county election officials, organize and document findings, review findings with stakeholders previously interviewed to ensure accuracy and completeness, and, after confirming the accuracy of the current state description, document findings in a current state report. Likewise, each analysis team will, for their assigned Subject Area, further interview stakeholders to establish a vision for the desired future state, capture and confirm findings with the appropriate stakeholders and document their findings in a future state report. This part of the analysis may identify specific features or functions in the current system that are no longer required, may require modification or should be replaced with new functionality. Contrasting the current state with the future state will represent a gap analysis that will document those business rules and functions in the current system that must be recreated and those functions that must be modified or replaced. The final step in the analysis phases will bring all 3 analysis teams together to conduct a cross-functional analysis to determine commonalities, dependencies and inconsistencies among the various Subject Areas. The project management team will reconcile the individual Subject Area analyses into a cohesive integrated representation of the desired future state. Since the analysis teams will each require significant time from state and county officials – 3 – 5 days per Subject Area for both the current and future states, interview and confirmation sessions will be conducted serially.

At the conclusion of our analysis project we will deliver:

1. **Requirements Register** – This document will be the repository for aggregating all requirements identified during each task in the analysis project – it will evolve as the project progresses. Each requirement will be:

    o identified by a specific identifier, for cross-referencing;

    o categorized by type;

    o associated to a functional area;

    o noted as existing/retiring/new;

    o described, with appropriate references;

    o prioritized;

- o quantified, to the extent possible.

This organized collection of requirements can be used for traceability during a future project, to:
- o support design efforts;
- o ensure work is aligned with requirements;
- o manage changes;
- o correlate with test cases (i.e. does design/functionality support requirements; are all requirements met within the new system/processes).

2. **Conceptual Overview** – An overview of the analysis will be provided that will summarize purpose, goals, strategy, future-state vision, high-level requirements, major process implications, expected risks, and recommendations regarding how to proceed.

3. **Process Summary** – Primary processes envisioned for a future system will be described for planning, further discussion with stakeholders, and inclusion in specifications for a project to implement a new system.

4. **Plan & Budget** – Using the documented requirements, analysis, processes that must be supported, and recommendations, the Quest team will work with the OSOS team to achieve concurrence on future direction. Based on that, the Quest team will propose a project plan and provide a corresponding budget to implement a new system to address the State's voter registration (and related) needs.

5. **Presentation of Findings & Recommendations** – A meeting will be conducted with stakeholders and key project participants to review major deliverables, key requirements and process changes, conclusions, recommendations, and planning input.

For each of the project deliverables described in the remainder of this section, the analysis team will complete the following high-level tasks:

- **Draw on subject-matter expertise** – The analytical team will regularly rely on knowledge and experience of Quest's voter registration team, who have supported HAVA-compliant voter registration systems for over 18 years, to ask effective questions, understand needs, and make useful recommendations.

- **Review documentation** – Including legal, functional, and technical documentation to identify requirements, assumptions and constraints that must be documented and/or considered.

- **Review existing processes** – All processes related to voter registration should be reviewed with staff who perform them (at State and County levels), including forms and use thereof, since they represent instances of data moving into and out of the system(s) under consideration.

- **Review existing software systems** – Examine functionality at State and County levels to clarify and take inventory of requirements served, data used, business rules, and relevant capabilities. This will include demonstrations, observations of systems in use, and/or access to test instances of current systems (state-level and county-level). Primary systems, interfacing systems, and points of integration must be examined.

- **Conduct stakeholder meetings** – Interviews will be conducted with managers, users, and others affected by existing systems and processes to understand the current state, to explore issues, to identify needs, and to uncover opportunities.

- **Clarify vision, objectives, and needs** – Based on understanding the current system and processes, OSOS goals, evolving legal, functional and technical needs, and opportunities for improvement, the team will document revisions to existing requirements and new requirements that are identified, including:
  - Business requirements: needs of the overall OSOS voter registration organization
  - Stakeholder requirements: needs identified for specific stakeholders
  - Solution requirements: functional and non-functional needs
  - Transition requirements: to get from the current to the future state

- **Review for process improvements** – Core processes will be examined to improve efficiency and effectiveness fulfilling existing and future system requirements. Opportunities will be discussed that arise from inclusion of new technologies (i.e. that did not exist when current systems were implemented). Process changes and improvements will be clarified, identifying expected benefits.

- **Summarization of findings, recommendations, and planning** – Requirements identified, conclusions reached, and progress achieved during analysis will be summarized and organized with appropriate recommendations to enable the State to move forward pursing new systems, to:
  - seek support from the broader stakeholder community;
  - express needs such that potential partners can respond effectively;
  - identify planning assumptions; constraints, and risks;
  - determine resources needed and likely schedule.

Completing a thorough, high-quality analysis will require significant commitment of time from the Washington team, at the State and County levels, to participate in interviews, analysis sessions, review, follow-up, and planning.

Critical to success of the analysis is to achieve agreement among stakeholders that the specific requirements and associated documents clearly and accurately describe the system(s) and outcomes desired in the future.

Phase 1 - Initiation – Project Startup & Planning

Purpose

Objectives of this deliverable include:

- formally kick off the project;
- establish project management processes and tools:
  - project management documents including a Project Charter and a detailed Project Plan;
  - project team portal.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- establish project organization, documents, portal, kickoff;
- review initial vision, objectives, strategic input and related targets;
- understand assumptions and constraints;
- formulate initial plan with project sponsor(s);
- initiate weekly status reporting, status review meetings.

Work Product

Results of completing this deliverable will be:

- Project Plan Package

Phase 2 - Discovery – Orientation & Initial Requirements

Purpose

Objectives of this deliverable include:

- acclimate the team to the State's Voter Registration team, environment, system, and processes;
- conduct high level discovery to provide a basis for the more detailed analysis to follow;
- leverage Quest's substantial voter registration experience to enable the analytical team to identify, gather and organize relevant documentation from state/county voter registration teams.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- legal review;
- documentation review;
- technology review;
- high-level system demonstrations (state-level and county-level);
- stakeholder identification, primary contacts/roles;
- analysis work planning, initial documents/content.

Work Product

Results of completing this deliverable will be:

- Initial requirements
- Interview schedules, plan updates

Phase 3 - Current State Analysis

Subject Area: Voter Registration

Purpose

Objectives of this deliverable include:

- Understand the processes through which people are registered to vote in Washington;
- Identify legal requirements and operating rules that must be supported in registration processes;
- Clarify all sources, uses, and users of voter registration data.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- View voter information
- Find voter by: matches, prohibited, jurisdiction, SSN, ID, address, barcode
- Signature history & management
- Reporting needs
- Voter data exports
- Cross-locality move information
- Voting history
- Voter registration forms

Work Product

Results of completing this deliverable will be:

- Voter registration requirements, to be added to the requirements register
- Current voter registration processes (state and county), with notable needs and issues
- Analysis notes and artifacts. These may include analyst's notes, forms, public documents, user documents, lists from users, current system documentation, administrative policies and procedures, and legal content.
- Functional interface descriptions – county, state, and federal systems

Subject Area: Voter Registration Updates & Administration

Purpose

Objectives of this deliverable include:

- Understand under what circumstances, the means by which, and by whom voter registration information is updated and managed at the state and county levels;
- Identify (state and federal) legal requirements and operating rules applicable to voter registration updates;
- Review sources, uses, and users of voter registration data and confirm data and processes used to validate and manage the quality of Washington's voter registration data.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- Maintain registration (in-person, mail-in, online, other agencies (NVRA tracking code)) and history
- Registration correction
- Scan and store voter documents
- Maintain document images, signatures
- Validate SSN (SSA)
- Standardize address (content, format)
- NCOA check, processing, list management
- Process MV registration (DOL interface)
- Process MV out-of-state notices
- Cross-state matching (ERIC, STEVE, EVVE)
- Maintain prohibited voter list, DOC matching
- Process death list, DOH matching
- Registration duplicates management
- Auto-cancel registration
- Process county transfer notice
- Add registration comment
- Change registration status
- Correspond with voter
- Jury pools & participation
- EAC interaction (Admin)
- Identify precincts & districts
- Maintain precincts & districts (Admin)
- Report precinct information
- Change locations

Work Product

Results of completing this deliverable will be:

- Voter registration update and administration requirements, to be added to the requirements register;
- Descriptions of current voter registration update and administration processes (state and county), with notable needs and issues;
- Functional interface descriptions - county, state, and federal systems;
- Analysis notes and artifacts.

Subject Area: Absentee Voting

Purpose

Objectives of this deliverable include:

- Understand and describe Washington's absentee voting process: general laws/rules, ballot requests, fulfillment, management, processing, and subsequent reporting.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- Absentee voter application (find, maintain, reject)
- Generate request for ID
- Absentee ballot (find, issue, receive, maintain)
- UOCAVA support
- Generate reminders, documents, labels
- Process, report absentee information

Work Product

Results of completing this deliverable will be:

- Absentee voting requirements, to be added to the requirements register;
- Descriptions of current absentee voting processes, with notable needs and issues;
- Analysis notes and artifacts.

Subject Area: Election Management

Purpose

Objectives of this deliverable include:

- Describe current needs, rules, and process to define entities, attributes and rules to conduct elections;
- Document users and uses of the election management functionality and of the information within it.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- Jurisdictions, Districts/redistricting, Offices, Terms
- Polls: locations, equipment, workers
- Elections: setup, ballots, results
- Candidates: create, find, maintain, qualify, correspond
- Referenda, Measures, Petitions: create, find, maintain
- Prepare for election (poll list, poll books)
- Provisional ballots
- Election reporting
- Campaign finance integration

Work Product

Results of completing this deliverable will be:

- Requirements related to election management, to add to the requirements register;
- Descriptions of election management processes, with notable needs and issues;
- Analysis notes and artifacts.

Subject Area: Reports, Forms, Extracts

Purpose

Objectives of this deliverable include:

- Take inventory of all:
  - reports produced from the current system(s);
  - forms used in (or reproduced from) processes related to the current system(s);
    - it is particularly important to identify/understand official forms in use;
  - data extraction processes (system-to-human, system-to-system) currently in use;
  - ad hoc data search and retrieval capabilities currently in use.
- Describe general current needs served by (and issues related to) existing reporting, data extraction and query capabilities.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- Duplicates list(s)
- Mailings / labels
- Voter information exports
- Voting history
- Directories

Work Product

Results of completing this deliverable will be:

- Requirements to query/report/extract data and to publish it, to be added to the requirements register;
- Read-only data access processes and tools, used by state and county users, with notable needs and issues
- Notable functional county/state/federal interfaces (data moving in/out of VR-related systems)
- Analysis notes and artifacts.

Subject Area: Public Web Site

Purpose

Objectives of this deliverable include:

- Clarify State and County systems exposure on the Internet, to the public, or where login is required;
- Understand ways in which data and capabilities are accessible via the Internet, either to human users (typically through a browser) or to other computer systems (typically through defined interfaces).

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, include:

- Voter information
- Online Voter Registration
- Online Absentee Ballots
- Provisional ballot lookup
- What's On Your Ballot
- Documentation Review
- Election Night Reporting

Work Product

Results of completing this deliverable will be:

- Current requirements for public and/or secure access to VR-related data and system capabilities (through a browser, a web service, or some other Internet-based capability) to add to the requirements register;
- Descriptions of Internet publication, access and usage processes, with notable needs and issues;
- Analysis notes and artifacts.

Subject Area: Technology

Purpose

Objectives of this deliverable include:

- Understand and document information technology (IT) currently in use to operate voter registration systems in Washington, both at the State and County levels;
- clarify technology standards/requirements that have been formalized, with related issues and needs;
- describe any IT-related initiatives that currently exist that directly relate to voter registration systems;
- identify technology vendors and partners currently engaged with existing voter registration systems and processes, including licenses and agreements in place.

Approach

Perform analytical work as described in the "Analysis Approach" section. Work required for this deliverable will be to assess, understand, and document the current state of the following at the State and County levels, including interfacing systems and protocols for communicating with them. For this deliverable, include

- Platform – physical systems (hardware, software, network) on which the systems run
- Architecture – logical / technical summary of system(s) structure and interaction
- Data – database(s), data sources/sinks, interfaces
- Security – overall system, access, and functional security/authentication in interacting systems

Work Product

Results of completing this deliverable will be:

- Specific technical requirements currently in place, to be added to the requirements register, including those that have been formalized and those that exist because they are (and will continue to be) in place;
- Inventory of information technologies currently in use;
- Architectural overview of existing systems (VR-specific and interfaces);
- Analysis notes and artifacts.

Phase 4 - Future State Analysis

Subject Area: Voter Registration

Purpose

Objectives of this deliverable include:

- Understand expected changes to legal requirements and operating rules that must be supported or for which flexibility should exist to support in the future;
- Document new data requirements: definitions, sources, uses, users;
- Identify process changes needed to how people register to vote and improvements for consideration;
- Determine how new technologies may be used to improve processes directly related to registration.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- View voter information
- Find voter by: matches, prohibited, jurisdiction, SSN, ID, address, barcode
- Signature history & management
- Reporting needs
- Voter data exports
- Cross-locality move information
- Voting history
- Voter registration forms

Work Product

Results of completing this deliverable will be:

- New voter registration requirements, to add to the requirements register
- Revisions to voter registration processes (state and county), with notable needs and issues, and process improvement opportunities, for review and discussion
- Analysis notes
- Updated/new functional interface descriptions - county, state, and federal systems.

Subject Area: Voter Registration Updates & Administration

Purpose

Objectives of this deliverable include:

- Document required/proposed revisions to data, rules, processes and roles for updating and managing voter registration information at the state and county levels;
- Update (current state) review of sources, uses, and users of voter registration data and confirm how the quality of Washington's voter registration data and processes will be validated and managed in the future.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- Maintain registration (in-person, mail-in, online, other agencies (NVRA tracking code)) and history
- Registration correction
- Scan and store voter documents
- Maintain document images, signatures
- Validate SSN (SSA)
- Standardize address (content, format)
- NCOA check, processing, list management
- Process MV registration (DOL interface)
- Process MV out-of-state notices
- Cross-state matching (ERIC, STEVE, EVVE)
- Maintain prohibited voter list, DOC matching
- Process death list, DOH matching
- Registration duplicates management
- Auto-cancel registration
- Process county transfer notice
- Add registration comment
- Change registration status
- Correspond with voter
- Jury pools & participation
- EAC interaction (Admin)
- Identify precincts & districts
- Maintain precincts & districts (Admin)
- Report precinct information
- Change locations

Work Product

Results of completing this deliverable will be:

- New/revised voter registration update and administration requirements, to be added / applied to the requirements register;
- Descriptions of new/revised voter registration update and administration processes (state and county), describing how notable needs and issues can be addressed;
- Updates to functional interface descriptions - county, state, and federal systems;
- Analysis notes.

Subject Area: Absentee Voting

Purpose

Objectives of this deliverable include:

- Describe changes (required and proposed) to Washington's absentee voting process: legal changes and impact thereof, business rules, ballot requests, fulfillment, management, processing, and reporting.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- Absentee voter application (find, maintain, reject)
- Generate request for ID
- Absentee ballot (find, issue, receive, maintain)
- UOCAVA support
- Generate reminders, documents, labels
- Process, report absentee information

Work Product

Results of completing this deliverable will be:

- New absentee voting requirements, to be added to the requirements register;
- Descriptions of future absentee voting processes;
- Analysis notes.

Subject Area: Election Management

Purpose

Objectives of this deliverable include:

- Describe future needs, rules, and process to define entities, attributes and rules to conduct elections;
- Update users and uses of the election management functionality and of the information within it.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- Jurisdictions, Districts/redistricting, Offices, Terms
- Polls: locations, equipment, workers
- Elections: setup, ballots, results
- Candidates: create, find, maintain, qualify, correspond
- Referenda, Measures, Petitions: create, find, maintain
- Prepare for election (poll list, poll books)
- Provisional ballots
- Election reporting
- Campaign finance integration

Work Product

Results of completing this deliverable will be:

- Future election management needs and changes, to add to and update the requirements register;
- Revisions to election management processes, with notable needs and issues;
- Analysis notes.

Subject Area: Reports, Forms, Extracts

Purpose

Objectives of this deliverable include:

- Describe needs and user/usage changes regarding:
  - reports produced from the future system(s);
  - forms needed in (or to be reproduced from) processes related to the future system(s);
    - clearly identify/understand official forms needed;
  - data extraction processes (system-to-human, system-to-system) that will be needed;
  - ad hoc data search and retrieval capabilities that should be in the new system(s).

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- Duplicates list(s)
- Mailings / labels
- Voter information exports
- Voting history
- Directories

Work Product

Results of completing this deliverable will be:

- Requirements to query/report/extract data and to publish it, to be added to the requirements register;
- Read-only data access processes and tools, to be used by state and county users;
- Revisions to (and new) functional county/state/federal interfaces (data moving in/out of VR-related systems)
- Analysis notes.

Subject Area: Public Web Site

Purpose

To improve how the OSOS leverages the Internet (pre-election, during election, post-election), objectives of this deliverable include

- Improve VR systems exposure to the public;
- Extend secure-access capabilities to VR-related functions anywhere and anytime;
- Identify opportunities for better voter service and overall cost savings;
- Make appropriate data and capabilities available to external systems, with sufficient authentication.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable, assess expected future needs and processes with regard to:

- Voter information
- Online Voter Registration
- Online Absentee Ballots
- Provisional ballot lookup
- What's On Your Ballot
- Documentation Review
- Election Night Reporting

Work Product

Results of completing this deliverable will be:

- To-be state requirements for public and/or secure access to VR-related data and system capabilities (through a browser, a web service, or some other Internet-based capability) to add to the requirements register;
- Descriptions of Internet publication, access and usage processes, with notable needs and issues;
- Analysis notes.

Subject Area: Technology

Purpose

Objectives of this deliverable include:

- Understand and document planned and opportunistic information technology (IT) to operate Washington's voter registration systems in the foreseeable future;
- confirm IT standards/requirements describing how and where they are applicable in the future;
- clarify technology requirements for all interfaces that will be needed.

At this stage, it is important to not constrain technical requirements such that they preclude opportunities, but it is also important to be clear where:

- the State may have technology standards to which new systems must adhere;
- interfacing systems will have certain technologies and protocols with which new systems must be compatible;
- different solutions will appear (from which to choose) and each will almost certainly use different technologies.

Approach

Perform analytical work as described in the "Analysis Approach" section. For this deliverable assess expected future needs and processes with regard to:

- Platform - physical systems (hardware, software, network) on which the systems run
- Architecture - logical / technical summary of system(s) structure and interaction
- Data - database(s), data sources/sinks, interfaces
- Security - overall system, access, and functional security/authentication in interacting systems
- Open data initiatives will be considered that are applicable for voter registration in Washington

Work Product

Results of completing this deliverable will be:

- Future technical requirements that are clearly applicable, to be added to the requirements register;
- Inventory of expected information technologies on which future systems will rely;
- Architectural overview of proposed solutions – both core systems and interfaces;
- Analysis notes.

Throughout the project and prior to Final Delivery, the Executive Sponsor and the Service Delivery Manager will work with the various Subject Area study teams to

ensure the final proposal material is consistent and represents the future state solution for all stakeholders and meets the overall objectives of the OSOS.

Phase 5 - Final Delivery

Purpose

Objectives of this deliverable include:

- Review project objectives, approach, activity, work products;
- Explain high-level findings and recommendations;
- Summarize current (as-is), future (to-be) states, and gaps between them;
- Describe process revision/improvement recommendations;
- Discuss recommendations for next steps and transitional (current-to-future) activities;
- Review budget/planning input.

Approach

For this deliverable, summarize the results of the project and recommendations regarding how to proceed:

- Conduct initial high-level results review with key stakeholders – revise as needed;
- Finalize project documents, publish to project portal;
- On-site presentation of results, findings, recommendations, budget/planning input.

Work Product

Results of completing this deliverable will be:

- Requirements Register
- Conceptual Overview
- Process Summary
- Plan & Budget
- Presentation of Findings & Recommendations
- Final updates to content on project portal

Weekly Project Status Reports

Purpose

Schedule management is often a very challenging aspect of the overall project management process. The project schedule is dependent on many interrelated components including:

- Accurate identification of the tasks and activities involved.
- Accurate estimate of the effort and duration of each task.
- Identification and assignment of properly skilled, available resources.

- Identification of task and activity dependencies.

If there is an issue in any of these areas, it can affect the project schedule significantly. Schedule management requires constant project management so that schedule changes are known as soon as they occur, the reason for the change is understood, and appropriate corrective action can be taken.

Approach

The project schedule will be maintained in Microsoft Project. All major project tasks will be put into Microsoft Project with their estimated effort, estimated duration, and dependencies. In addition, all project deliverables will be identified in the Microsoft Project schedule.

Weekly, the project manager will review the project schedule. Any changes to the baseline will be identified along with the cause for the change. Because of the tight timeline associated with this project, any changes that will impact the schedule will be communicated to OSOS for immediate discussion. Changes to the project schedule may be documented in the weekly project status report. Any change that is on the critical path (i.e. increases the total duration of the project) or any increase of more than one week on an individual task will require approval of the OSOS Project Coordinator.

C. Project Schedule

Included below are two representations of the project schedule. Figure 1 is a high level project schedule representing the phases of the project for the term. Figure 2 (task list) is an overview of the project plan including deliverables. After considering additional information from OSOS, the final detailed project plan will be delivered as part of the initial phase of the project.

The draft schedule is a projection and will be adjusted based on the actual project start date as well as any blackout periods during which the OSOS and/or county staff may be unavailable; e.g. during election periods.

State of Washington,
Office of the Secretary of State,
Elections Division
Elections Business Analysis & Business Requirements <u>Timeline</u>
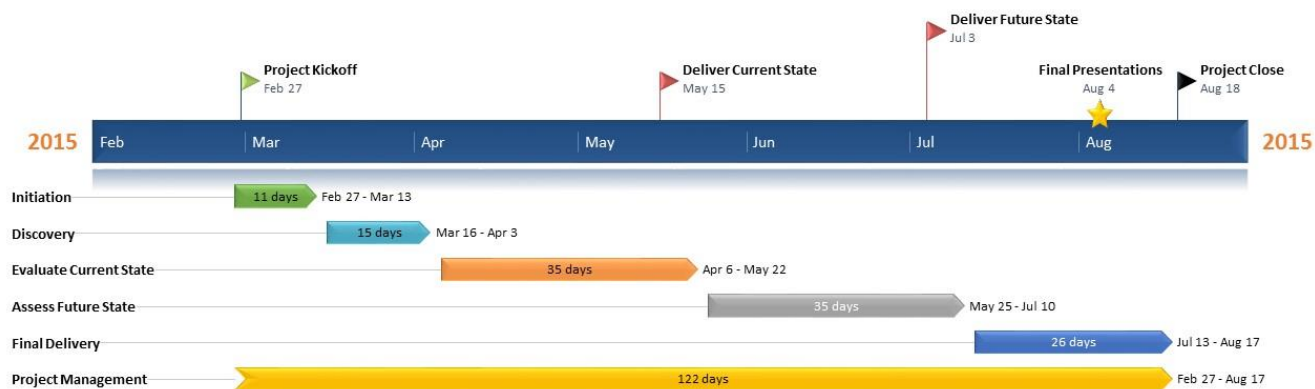
Figure 1 - high level project schedule

ID	Task Name	Start	Finish	Resource Names
1	**WA - Elections Business Analysis & Business Requirements**	**Fri 2/27/15**	**Tue 8/18/15**	
2	**Initiation**	**Fri 2/27/15**	**Fri 3/13/15**	
3	**Project Plan Deliverables**	**Fri 2/27/15**	**Fri 3/13/15**	
4	Set Up Project Portal	Fri 2/27/15	Fri 2/27/15	Q - PM
5	Project planning	Fri 2/27/15	Fri 3/6/15	Q - PM[50%],Q - SDM [50%]
6	Develop Project Plan Documents	Fri 3/6/15	Fri 3/13/15	Q - PM
7	**D1 - Project Plan Work Package**	Fri 3/13/15	Fri 3/13/15	
8	**Initiation - Complete**	Fri 3/13/15	Fri 3/13/15	
9	**Discovery**	**Fri 3/13/15**	**Fri 4/3/15**	
10	**Preliminary Requirements Gathering & Planning**	**Fri 3/13/15**	**Fri 3/27/15**	
11	Legal Review	Mon 3/16/15	Thu 3/19/15	Q - BA1[75%],Q - BA2[75%],Q - SME1[75%],Q - SME2[75%],GCR - BA1[75%],GCR - SME1[75%]
12	Documentation Review	Thu 3/19/15	Fri 3/27/15	Q - BA1[75%],Q - BA2[75%],Q - SME1[75%],Q - SME2[75%],GCR - BA1[75%],GCR - SME1[75%]
13	Technology Review	Fri 3/13/15	Fri 3/27/15	Q - Arch
14	Resource Scheduling, Interview, Plan Updates	Fri 3/13/15	Fri 3/27/15	Q - PM,Q - SDM
15	Develop Core Requirements	Mon 3/23/15	Fri 3/27/15	GCR - BA1,Q - BA1,Q - BA2
16	**D2 - Initial Requirements Work Package**	Fri 3/27/15	Fri 3/27/15	
17	**Discovery - Complete**	Fri 4/3/15	Fri 4/3/15	
18	**Evaluate & Document Current State**	**Mon 4/6/15**	**Fri 5/22/15**	
19	**Evaluate Current State**	**Mon 4/6/15**	**Fri 5/1/15**	
20	**Stakeholder Interviews**	**Mon 4/6/15**	**Fri 5/1/15**	
21	Team A	Mon 4/6/15	Fri 4/10/15	Q - BA1,Q - SDM ,Q - SME1
22	Team B	Mon 4/13/15	Fri 4/17/15	Q - SDM ,Q - SME2,GCR - BA1
23	Team C	Mon 4/20/15	Fri 4/24/15	Q - BA2,GCR - SME1,Q - SDM
24	Team - Tech	Mon 4/27/15	Fri 5/1/15	Q - Arch,Q - SDM
25	**Business Process Documentation & Review**	**Wed 4/15/15**	**Mon 5/18/15**	
26	**Business Process Documentation - Current State**	**Wed 4/15/15**	**Mon 5/18/15**	
27	**Voter Registration**	**Wed 4/15/15**	**Mon 4/27/15**	
28	Team A	Wed 4/15/15	Mon 4/27/15	Q - BA1[75%],Q - SME1[75%]
29	**Voter Registration Updates & Administer**	**Mon 4/27/15**	**Thu 5/7/15**	
30	Team A	Mon 4/27/15	Thu 5/7/15	Q - BA1[75%],Q - SME1[75%]
31	**Absentee Voting**	**Wed 4/22/15**	**Thu 4/30/15**	
32	Team B	Wed 4/22/15	Thu 4/30/15	GCR - BA1[75%],Q - SME2[75%]
33	**Election Management**	**Wed 4/29/15**	**Mon 5/18/15**	
34	Team C	Wed 4/29/15	Mon 5/18/15	GCR - SME1[75%],Q - BA2[75%]
35	**Reports, Forms & Extracts**	**Thu 4/30/15**	**Fri 5/8/15**	
36	Team B	Thu 4/30/15	Fri 5/8/15	GCR - BA1[75%],Q - SME2[75%]
37	**Public Site**	**Fri 5/8/15**	**Mon 5/18/15**	
38	Team B	Fri 5/8/15	Mon 5/18/15	GCR - BA1[75%],Q - SME2[75%]
39	**Technical (Data, Security & Architecture)**	**Fri 5/1/15**	**Mon 5/18/15**	
40	Team - Tech	Fri 5/1/15	Mon 5/18/15	Q - Arch[75%]
41	**D3 - Current State - Business Process Documentation Work Package**	Mon 5/18/15	Mon 5/18/15	
42	**Evaluate & Document Current State - Complete**	Fri 5/22/15	Fri 5/22/15	
43	**Assess & Document Desired (Future) State**	**Mon 5/25/15**	**Fri 7/10/15**	
44	**Assess Future State**	**Mon 5/25/15**	**Fri 6/19/15**	
45	**Stakeholder Interviews**	**Mon 5/25/15**	**Fri 6/19/15**	
46	Team A	Mon 5/25/15	Fri 5/29/15	Q - BA1,Q - SDM ,Q - SME1
47	Team B	Mon 6/1/15	Fri 6/5/15	Q - SME2,GCR - BA1,Q - SDM
48	Team C	Mon 6/8/15	Fri 6/12/15	GCR - SME1,Q - SDM ,Q - BA2
49	Team - Tech	Mon 6/15/15	Fri 6/19/15	Q - Arch,Q - SDM
50	**Business Process Documentation & Review**	**Wed 6/3/15**	**Fri 7/3/15**	
51	**Future State - Business Process Documentation**	**Wed 6/3/15**	**Fri 7/3/15**	
52	**Voter Registration**	**Wed 6/3/15**	**Thu 6/11/15**	
53	Team A	Wed 6/3/15	Thu 6/11/15	Q - BA1[75%],Q - SME1[75%]
54	**Voter Registration Updates & Administer**	**Thu 6/11/15**	**Mon 6/22/15**	
55	Team A	Thu 6/11/15	Mon 6/22/15	Q - BA1[75%],Q - SME1[75%]
56	**Absentee Voting**	**Wed 6/10/15**	**Wed 6/17/15**	
57	Team B	Wed 6/10/15	Wed 6/17/15	GCR - BA1[75%],Q - SME2[75%]
58	**Election Management**	**Wed 6/17/15**	**Wed 7/1/15**	
59	Team C	Wed 6/17/15	Wed 7/1/15	GCR - SME1[75%],Q - BA2[75%]
60	**Reports, Forms & Extracts**	**Wed 6/17/15**	**Wed 6/24/15**	
61	Team B	Wed 6/17/15	Wed 6/24/15	GCR - BA1[75%],Q - SME2[75%]
62	**Public Site**	**Wed 6/24/15**	**Thu 7/2/15**	
63	Team B	Wed 6/24/15	Thu 7/2/15	GCR - BA1[75%],Q - SME2[75%]
64	**Technical (Data, Security & Architecture)**	**Fri 6/19/15**	**Fri 7/3/15**	
65	Team - Tech	Fri 6/19/15	Fri 7/3/15	Q - Arch[75%]
66	**D4 - Future State - Business Process Documentation Work Package**	Fri 7/3/15	Fri 7/3/15	
67	**Evaluate & Document Future State - Complete**	Fri 7/10/15	Fri 7/10/15	
68	**Final Delivery**	**Mon 7/13/15**	**Mon 8/18/15**	
69	**Strategic Overview Documentation**	**Mon 7/13/15**	**Mon 7/27/15**	
70	Requirements Matrix Finalization and Rankings	Mon 7/13/15	Mon 7/20/15	Q - BA1[75%],Q - BA2[75%],GCR - BA1[75%]
71	Develop Conceptual Overview Documentation	Mon 7/13/15	Mon 7/27/15	Q - SDM [75%],Q - SME1[75%],Q - SME2[75%],GCR - SME1[75%]
72	Develop Implementation Plan, Timeline & Estimates	Mon 7/13/15	Mon 7/27/15	Q - PM
73	**D5 - Final Delivery Work Package**	Mon 7/27/15	Mon 7/27/15	
74	**On-Site Presentation(s)**	Mon 8/3/15	Mon 8/10/15	Q - Exec.,Q - SME1,Q - SDM
75	**Final Delivery - Complete**	Mon 8/17/15	Mon 8/17/15	
76	**Project Management**	**Fri 2/27/15**	**Tue 8/18/15**	
77	Project Execution & Control	Fri 2/27/15	Tue 8/18/15	Q - PM[16%]
78	**Project Status & Reports**	**Fri 2/27/15**	**Tue 8/18/15**	
79	**S1-S26 - Weekly Status reports**	Fri 2/27/15	Tue 8/18/15	

Figure 2 - detailed task list

D. Deliverables

Deliverables, or Work Products, are outlined within the Work Plan found in section 3.2B, and are summarized below.

Phase	Deliverable	Projected Date

Initiation	**D1 - Project Plan Work Package**
	
	  Set Up Project Portal
	
	  Develop Project Plan Documents
		3/13/2015

Discovery	**D2 - Initial Requirements Work Package** Initial requirements Interview schedules, plan updates	**3/27/2015**
Evaluate & Document Current State	**D3 - Current State - Business Process Documentation Work Package** Voter registration requirements, to be added to the requirements register Current voter registration processes (state and county), with notable needs and issues Analysis notes and artifacts Functional interface descriptions – county, state, and federal systems Voter registration update and administration requirements, to be added to the requirements register; Descriptions of current voter registration update and administration processes (state and county), with notable needs and issues; Functional interface descriptions - county, state, and federal systems; Absentee voting requirements, to be added to the requirements register; Descriptions of current absentee voting processes, with notable needs and issues; Requirements related to election management, to add to the requirements register; Descriptions of election management processes, with notable needs and issues; Requirements to query/report/extract data and to publish it, to be added to the requirements register; Read-only data access processes and tools, used by state and county users, with notable needs and issues Notable functional county/state/federal interfaces (data moving in/out of VR-related systems) Current requirements for public and/or secure access to VR-related data and system capabilities (through a browser, a web service, or some other Internet-based capability) to add to the requirements register; Descriptions of Internet publication, access and usage processes, with notable needs and issues; Specific technical requirements currently in place, to be added to the requirements register, including those that have been formalized and those that exist because they are (and will continue to be) in place; Inventory of information technologies currently in use; Architectural overview of existing systems (VR-specific and interfaces);	**5/18/2015**
Assess & Document Desired (Future) State	**D4 - Future State - Business Process Documentation Work Package** New voter registration requirements, to add to the requirements register Revisions to voter registration processes (state and county), with notable needs and issues, and process improvement opportunities, for review and discussion Updated/new functional interface descriptions - county, state, and federal systems.	**7/3/2015**

	New/revised voter registration update and administration requirements, to be added / applied to the requirements register;	
	Descriptions of new/revised voter registration update and administration processes (state and county), describing how notable needs and issues can be addressed; Updates to functional interface descriptions - county, state, and federal systems; New absentee voting requirements, to be added to the requirements register; Descriptions of future absentee voting processes;	
	Future election management needs and changes, to add to and update the requirements register; Revisions to election management processes, with notable needs and issues; Requirements to query/report/extract data and to publish it, to be added to the requirements register; Read-only data access processes and tools, to be used by state and county users; Revisions to (and new) functional county/state/federal interfaces (data moving in/out of VR-related systems) To-be state requirements for public and/or secure access to VR-related data and system capabilities (through a browser, a web service, or some other Internet-based capability) to add to the requirements register; Descriptions of Internet publication, access and usage processes, with notable needs and issues; Future technical requirements that are clearly applicable, to be added to the requirements register; Inventory of expected information technologies on which future systems will rely; Architectural overview of proposed solutions – both core systems and interfaces; Analysis notes.	
Final Delivery	**D5 - Final Delivery Work Package** Requirements Register Matrix and Rankings Conceptual Overview Process Summary Implementation Plan, Timeline & Estimates Presentation of Findings & Recommendations Final updates to content on project portal	**8/10/2015**
Project Management	**S1-S26 - Weekly Status reports**	**weekly**

E. Outcomes and Performance Measurement (Optional)

Quest's project methodology includes weekly project reviews by the Quest Project Management Office. The results of these reviews are shared with customers upon request.

Additionally, larger projects and projects with longer durations are reviewed by the Quest Executive Sponsor. The project staffing model does include a Quest Executive Sponsor, Steve McNear, because of his specific election management experience.

All Quest projects utilize a project portal that is made available to all project team members. OSOS and county project participants will have direct access to all project

documentation at any point during the project, including status reports and project issue lists. Quest believes that project communication is the single most important aspect of project risk and performance management and is committed to the highest level of project communications.

Another goal of the project will be on change management and gaining the buy in and support of the various OSOS and county end user communities through their participation in the initial requirements gathering and scoping of the project. Quest will place special emphasis on inclusion and communication with all participants as part of our methodology and approach.

Quest will follow the detailed methodology outlined below throughout the project.

F. Risks

In any large system analysis the inclusion of the people that will eventually use the system is critical. Nothing can derail a project like uninvolved users that will ultimately have to use the system to perform their daily tasks or lack of consideration for their needs. Conversely, the best way to ensure the success of the project is to work with the end user community, both state and local, throughout the process. The participation and support of state and local end user communities in initial requirements gathering process is critical not only for this phase, but for any subsequent solution procurement that may result from this effort.

As part of each Subject Area analysis, the Quest team will perform a risk analysis and incorporate any risks into the requirements for future consideration.

Overall Risk

Quest believes that the most significant risk facing OSOS for this project is the challenge of performing the requirements gathering across the various stakeholders, OSOS and counties large and small, and still having a well-integrated solution as the final goal. Agencies are working with pressures to provide a user-centric solution in a business environment that has typically been segregated into disparate systems, processes and business practices. Requirements to maintain and process information for a voter record, both to support customer service goals and HAVA requirements will continue to challenge OSOS to move to integrated solutions. Quest's delivery management team approach including our extensive subject matter expertise and experience, executive sponsorship and the service delivery manager ensure common goals and continuity across the project will mitigate risk.

Specific Risk

Unique requirements across jurisdictions add to the complexity of any integrated solution in the voter registration market. Businesses and practices for a large county may be very different that for a small county. State requirements can sometimes clash with county level processes, resources and expectations. These limitations will

challenge the requirements teams to create agreed to, consolidated detailed requirement and a vision for the future state. Quest has added time and resources to the proposed team to address these challenges – the addition of industry experts (SME's) to each of the teams assigned to Subject Areas will mitigate much of this risk.

3.3 MANAGEMENT PROPOSAL

A. Project Management (SCORED)

1. Project Team Structure/Internal Controls

Quest proposes a project team that will be led by a Project Manager with strong support of the Service Delivery Manager. The Project Manager and Service Delivery Manager will oversee all studies and maintain continuity across the Subject Areas and keep the focus on common goals. Each Subject Area analysis will be led by a Facilitator, Business Analyst and a Subject Matter Expert who will be heavily involved to lend their expertise and deep perspective.

Steve McNear, Executive Sponsor

Sean Fahey, Service Delivery Manager

Jim Stewart, Project Manager

Subject Area – Team A

      Wendi Mott, Voter Registration Subject Matter Expert

      Darrin Snider, Business Analyst/Technical Writer

Subject Area – Team B

      Kelly Sprague, Voter Registration Subject Matter Expert

      Kristin Arabally, Business Analyst/Technical Writer

Subject Area – Team C

      James Darragh, Voter Registration Subject Matter Expert

      Matt Hazard, Business Analyst/Technical Writer

Subject Area – Technical Team

      Mike Cameron, Technical Architect

      Cory Biggs, Senior Software Developer

      Kevin Reid, Quest FirstTuesday® DBA

The following figure shows the Quest organizational structure, including the lines of authority within Quest. Sean Fahey will have primary responsibility for the work product and Steve McNear has final authority.
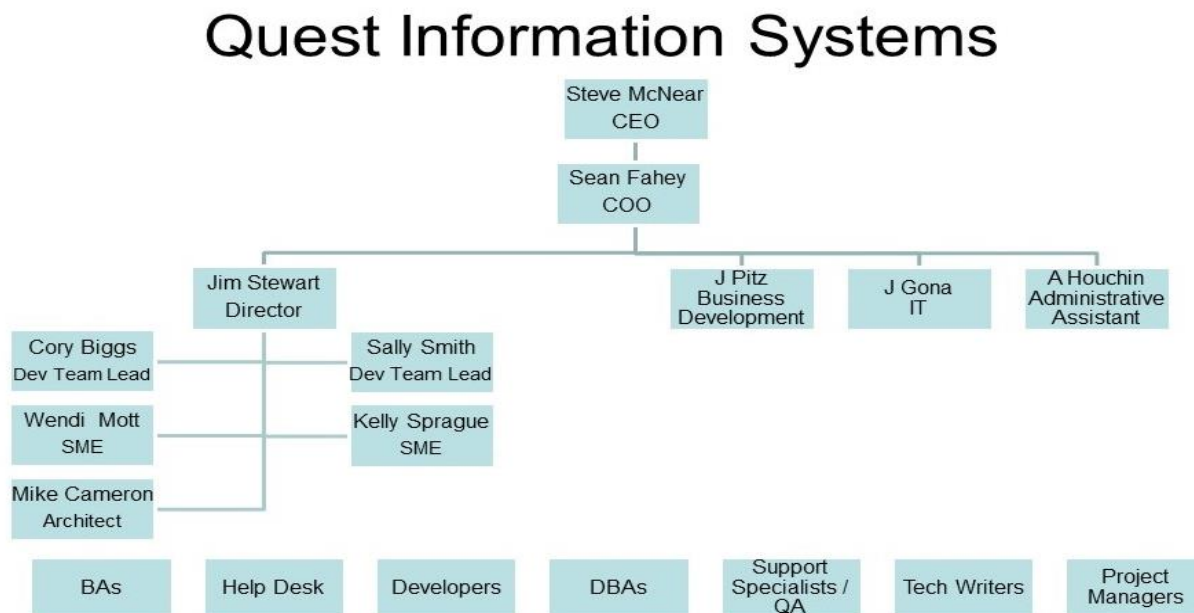
Quest Information Systems

Steve McNear
CEO

Sean Fahey
COO

Jim Stewart
Director

J Pitz
Business
Development

J Gona
IT

A Houchin
Administrative
Assistant

Cory Biggs
Dev Team Lead

Sally Smith
Dev Team Lead

Wendi Mott
SME

Kelly Sprague
SME

Mike Cameron
Architect

BAs | Help Desk | Developers | DBAs | Support Specialists / QA | Tech Writers | Project Managers

Figure 3 – Quest organization chart

The Quest PM will manage all Quest activities on the project, and serve as the central point of contact for project activities. The PM has responsibility for the quality of service and performance of the project and all subordinate activities. The PM will meet routinely with the OSOS PM to review project status, priorities, and schedules, and to discuss questions and issues. This essential communication reduces misinterpretation of assignments and provides a forum for collectively solving problems and introducing process improvements.

Quest Project Methodology and Processes

Quest believes that a key factor in the successful execution and delivery of any project is strong, experienced leadership that consistently practices proven project management techniques. As a company specializing in mission- critical software development projects, our project management staff has extensive expertise in delivering large, complex implementations. To achieve our commitment to on-time, on-budget, on-quality execution of our projects, the Quest Team has invested heavily in processes, practices and standards. The Quest Methodology represents our combined strategic, ongoing investment to incorporate best practices into a practical, effective approach to delivering IT services and overseeing projects. In each process area, the

Quest methodology includes a set of tools, templates, and best practice guidelines designed to assist our project managers in planning, monitoring and controlling all phases of the project life cycle.

Following is a brief description of the project management approach and deliverables for each of the project life cycle components to meet the requirements of the RFP.

System Project Portal

A project portal is a standard tool utilized in Quest projects. At project initiation, Quest will establish a project portal to facilitate communications with project participants. This portal will become an ongoing part of the project during the implementation, allowing all authorized stakeholders to have up-to-date access to project notifications, contact information, status reports, project deliverables and other project-related documents. The Project Portal will continue to be utilized post-implementation as a key communications tool for on-going support and maintenance of the system.

Project Schedule

The project schedule and work breakdown structures will be maintained in Microsoft Project. All project tasks will be put into Microsoft Project with their estimated effort, estimated duration, and dependencies. Project resources will be input at the lowest level practical. In addition, all project deliverables will be identified in the Microsoft Project schedule. Weekly, the project team will review the project schedule. Any changes will be identified along with the cause for the change. Any schedule changes will be identified and a determination of any corrective action will be made.

Communications

Effective reporting through meetings and written reports is essential to project success. Maintaining effective communications with all stakeholders is a key component of our approach to project management. During project initiation, the PM will work with the OSOS to establish a communications plan describing the regular communication that meets the project's needs.

Risk Management

The team will continually identify principal risks to the project and manage them based on their likelihood of occurring and their potential impact on the project. Examples of risk categories would be: Staffing, Quality, and Schedule. A list will be maintained in the Risk Log and reported as appropriate on the weekly Status Report.

Risk Management will be a responsibility of the Washington Project Manager and the Quest Project Manager throughout the lifecycle of the project, to evaluate and track risks. The risk management cycle will work as follows:

1. Risks will be identified and evaluated in terms of impact (to time, cost and quality).

2. Suitable responses for each risk will then be suggested falling into the following categories: Accept, Avoid, Mitigate, or Transfer.
3. Each risk will be assigned to an owner, who will monitor and report back to the team on its status. Risks will be discussed as appropriate, during project status meetings.
4. A Risk log will be kept and maintained by the Quest Project Manager and will be available to the project team on a regular basis.

Issue Management

The occurrence of issues during a project is inevitable, so the existence of a mechanism to manage these issues is essential. This procedure applies to all project issues/problems found, including but not limited to:

- Software (e.g., Project Requirements, Architecture, Design).
- Training and other delivery services.
- Project Resources (e.g., Team Members, Schedule, Budget, Tools).
- Environment (e.g., Office Space).

Scope Management

Scope management is the single most important factor in enabling a project to be delivered on time and on budget. The scope of the project identified in the contract will be monitored over the life of the engagement. In addition, there is a need to monitor scope for the PM engagement as well.

During the project, new features and functions not identified in the requirements register or in the RFP will invariably be identified. Some of these features and functions may have no material impact on the project schedule or cost. Regardless of the impact, all changes to the project will be captured, documented and approved.

Change Management

Quest recognizes that it is important for change management to be established early in the project life cycle. We propose to develop a change management plan and use an automated tool to manage, track, and analyze change requests from the initial identification through final resolution. Several factors may affect the process for handling change requests:

- Type of change — correction, adaptation, or enhancement.
- Priority of the change.
- Scope of the change.
- Timing of the change—when in the project life cycle the change is identified.

When a change request is initiated, these factors need to be considered so that the change can be handled in the appropriate and most efficient process. The Quest PM will work with the OSOS PM to ensure that:

- Change Requests are captured;
- Effort is estimated and impact is assessed;
- Change Orders are approved before any work occurs;
- Changes are managed based on impact, priority, and availability of resources.

Project Execution and Control

The Quest PM will continually monitor the team's activities to determine that project schedules are met and will update the project plan and schedule each week. The Quest PM will also work with The OSOS PM to detail the schedule of status meetings for the project team and progress meetings with the identified stakeholder groups. Status reporting is essential to managing successful projects; Quest will define a timeline and a detailed schedule for reporting status in accordance with the OSOS and project schedules.

Throughout the project, the OSOS and Quest project managers and team leads will meet periodically to discuss the project's status. Quest will provide written project status and formal deliverables and will utilize the project portal as the repository for all project communications after they are coordinated, reviewed, and approved.

Deliverable Acceptance

Acceptance is a formal process achieved by frequent OSOS review and approval of documentation and products delivered over the life of the project. For each deliverable and project phase, Quest will solicit acceptance from the OSOS. Each deliverable, when presented by Quest for review and approval, represents an assertion that the requirements of a previous deliverable have been satisfied. Project Acceptance processes will additionally be aligned with any contractual acceptance conditions.

2. Staff Qualifications/Experience

The Quest team members are outlined in the prior section (3.3 – A1), including team structure, qualifications, and responsibilities. The estimated amount of time each team member will be assigned to the project are shown below. Individual resumes follow the table below.

Quest acknowledges that OSOS will have final approval for any staff substitutions.

Estimate of Team Member Hours by project phase

Staff	Role	Initiation	Discovery	Current State	Future State	Final Delivery
Steve McNear	Executive Sponsor	10	10	10	10	40
Sean Fahey	Service Delivery Manager	32	56	96	96	40
Jim Stewart	Project Manager	84	96	40	40	40

Wendi Mott	Voter Registration Subject Matter Expert	8	72	114	104	32
Darrin Snider	Business Analyst/Technical Writer	8	14	96	104	32
Kelly Sprague	Voter Registration Subject Matter Expert	8	72	104	92	32
Kristin Arabally	Business Analyst/Technical Writer	8	48	104	92	24
James Darragh	Voter Registration Subject Matter Expert	8	48	112	84	24
Matt Hazard	Business Analyst/Technical Writer	8	24	112	84	32
Mike Cameron	Technical Architect	8	40	96	96	24
Cory Biggs	Senior Software Developer	8	20	24	16	
Kevin Reid	Quest FirstTuesday® DBA	8	16	24	16	

Sean Fahey
Service Delivery Manager

Sean has twenty years of broad, overlapping experience in the government and the IT industry including five years as a business analyst/project manager and service delivery manager for Indiana and Virginia voter registration systems. He has over thirteen years of experience in a variety of roles within state government. He is an articulate expert in account management, business development, and project implementation and skilled in providing solutions and delivering results.

Competencies

- Program / Project Management
- IT Alignment, Strategy & Planning
- Operational Management and Staff Development
- Business & Systems Analysis
- Business Process Re-engineering
- Requirements Definition
- Process Improvement

Education

MBA - Indiana University Kelley School of Business

Bachelor of Arts: Mathematics - Wabash

Experience

Quest Information Systems, Inc.

Services Delivery Manager - November, 2013 to Present
- Executive Liaison with the State of Indiana for management of the Statewide Voter Registration System (SVRS).
- Responsible for the delivery and execution of services provided to the State of Indiana, under the auspices of the Quest contract with the State.
- Key interface to the Secretary of State Office, Indiana Election Division, for strategic initiatives.
- Provides thought leadership to the State, Indiana Election Division, and outside consulting firms contracted with the State.
- Responsible for the deployment of services delivery resources required to meet the State's objectives for the enhancement of the Statewide Voter Registration System and related services.
- Works with Quest and State Executives to ensure compliance and customer satisfaction.

Xerox

Account Executive – Jan 2013 to June 2013
- Led the remediation and turnaround of a $3M / 35-person account through client meetings, evaluating the staff and processes, and developing and implementing a corrective action plan. Current results include substantial improvement in client satisfaction and the timely completion of key deliverables.
- Worked across multiple clients' sites and projects to assist teams in delivering Information Technology Outsourcing services.
- Directed the development and review of technical, operational, and financial solutions for new and existing accounts as key pursuit team leader

Managed Print Services Executive – April 2011 to Dec 2012
- Developed and implemented Managed Print Services (MPS) solutions to improve performance and control costs in clients' office print environments.

- Achieved 330% of plan for MPS in the first 9 months.
- Top 5 performer nationally; awarded President's Club.

ACS (ACQUIRED BY XEROX IN 2010)

Vice President Sales, Government Solutions – August 2009 to April 2011
- Managed state and local government relationships and developed business opportunities throughout the Midwest, with over $1B under contract.

QUEST INFORMATION SYSTEMS

Project Manager
- Managed Quest's Statewide Voter Registration System implementation for the Commonwealth of Virginia (VERIS)
- Acted as key liaison with the State of Virginia, Election Division
- Provided overall direction to the Quest VERIS team
- Managed on-going maintenance, support and enhancement efforts for VERIS

Business Development Manager – July 2007 to August 2009
- Managed all government business development for a $12M software company.
- Sold over $3M in the first 18 months while adding several new clients.
- Led business development effort to win bid for Colorado Campaign Finance solution (TRACER)

STATE OF INDIANA
INDIANA INTELENET COMMISSION

Executive Director - August 2004 to January 2005
- Managed a staff of 80 to administer a $24M high-speed network connecting schools, libraries, universities, and state and local government institutions.
- Reduced overhead by $1.5M by bringing functions in house and realigning staff.

E-Government Director - June 2004 to August 2004
- Developed and expanded the state's offering of online government services.
- Developed an evaluation of agency online applications to set priorities and measure progress in using the internet to deliver services more effectively.

INDIANA DEPARTMENT OF NATURAL RESOURCES

Deputy Director - 2002 to June 2004
- Reorganized IT, brought services online, and redesigned the Engineering Division.

OFFICE OF THE GOVERNOR / STATE BUDGET AGENCY

Director, High Performance Government - 2000 to 2002
- Redesigned redundant systems, increased efficiency and accountability of state government operations, and developed a statewide government accountability system.

INDIANA DEPARTMENT OF ADMINISTRATION

Executive Assistant for Economic Development - 2000 to 2001
Procurement Director - 1997 to 2000
- Managed a staff of 50 to administer purchasing activities of state agencies.
- Reduced staff by more than 20 percent while increasing productivity.
- Developed web-based posting of bid opportunities, resulting in significantly reduced paper consumption, printing, and distribution costs while increasing productivity.

Competencies

Portfolio/Project
Management

IT Planning

IT Management

Business Process Analysis &
Redesign

Requirements Definition

Meeting Facilitation

Methodologies (PMBOK,
RUP, XP, Scrum)

Systems Analysis, Design &
Development

Application Management

Skills

Microsoft Project
Professional and Server

.NET design and
development tools

Web Technologies

Networking Technologies

Certifications

PMP – Project Management
Institute

Education

Advanced Project
Management,
Stanford University

B.S. in Computer
Programming Technology,
Purdue University

Jim Stewart

Senior Project Manager

Jim is a thorough and dependable project leader focused on project results and exceeding client expectations. Jim has twenty years' experience designing, developing, implementing and supporting mission critical IT solutions. Jim has extensive program and customer relationship management skills with a client base comprised of state government and Fortune 500 companies across various industries.

Experience
Quest Information Systems: 7/2014 – Present

Senior Project Manager

- Project Management including planning, scheduling, organizing and managing teams of technical resources to insure the orderly and timely development of software enhancements for the Indiana Statewide Voter Registration System (SVRS).
- Manage and document project risks, issues and change management for each discrete SVRS enhancement and software development project.
- Coordinate and provide status and communication to the Indiana Election Division pertaining to all SVRS enhancements and projects.
- Manage regular software release upgrades for the Indiana SVRS application.
- Summarize and report on County interactions with the Indiana SVRS operations staff.

Bell Techlogix: 07/2013 – 07/2014

Senior Project Manager/PMO Manager

- Established a Project Management Office (PMO) improving the consistency, predictability and efficiency of the organization project delivery capability.
- Ensured standardized project methodologies were documented and followed.
- Responsible for resource assignments and performance of the PMO staff.
- Managed the selection/procurement of Microsoft Dynamics for a company-wide (ERP) implementation sponsored by the Bell Techlogix President.
- Managed eight network infrastructure projects for key clients in various industries.

Cumulus IT Group – 09/2011 – 06/2013

Senior Consultant (.5 years)

- Contracted Project Manager for a national for-profit college. Full project management lifecycle responsibilities for several concurrent software development projects. The scope/technology of the projects included Microsoft CRM, Search Engine Optimization, Document Management & Workflow, Automated Dialer/Call Center integration and .NET custom development.

Senior Project Manager (1 year)

- Contracted Project Manager for a non-for-profit organization. I provided management services for the implementation of an Enterprise Resource Planning (ERP) solution across various business divisions (Accounting, Purchasing, Financial Development, IT). The integrated solutions are utilized by over two hundred end users and fourteen branch locations.

Quest Information Systems: 2005 – 2011

Director, Application Management (.5 years)

- Led Application Management group that delivered client support services (hosting, application development, database maintenance, product training and end user support.
- Responsible for contract administration and customer service relationship management.
- Managed software releases, enhancements, change orders and modernization applications.

Director, Project Management Office (3 years)

- Implemented a Project Management Office (PMO) to provide project management accountability, transparency and support functions for the Quest portfolio of projects.
- Responsible for oversight, financial auditing, cash flow, risk mitigation and performance.
- Managed staff assignments, billable percentages and project resources.
- Standardized the Quest Project Management Methodology processes and documentation.

Senior Consultant/Senior Project Manager (3 years)

- Provided project/portfolio management, client communication, risk/quality/change management, issue resolution and deliverable signoff management.
- Managed a portfolio of 20+ development/implementation projects in a 36 month timeline.
- Responsible for managing a client portfolio of custom application development projects totaling 35,000 billable hours over 18 months. The completed solution automated the current manufacturing processes and supports 11,000 dealers, 94, 000 customers.
- Managed the implementation to replace a Virginia's 25-year-old, legacy Voter Registration System. The new system features real-time interfaces to several state agencies and a centralized voter registration database.
- Led a 15 member project team to develop and implement a statewide Campaign Finance Reporting System. The project included system design, development, testing, data conversion, and deployment releases.

ADESA: 2001 – 2004

Senior Project Manager

- Project Manager within the Software Development Group responsible for financial planning, project management and implementation of several new business line applications for ADESA's subsidiary companies.
- Managed the development and quarterly product releases for a loan transaction system; utilized by 80 financial offices and approximately 950,000 loan   transactions and 8,900 active accounts.

- Executed Analysis, ROI and Feasibility Assessment for the National Vehicle Donation Center and Impact salvage auctions. Selected and implemented a customizable COT's workflow/document management solution within proposed budget.
- Managed the integration of Mitsubishi's *Remarketing Information Management System* to ADESA's *Auction Management System,* encompassing financial data transfers, file layouts, functional specifications and report layouts.

IBM (Tivoli Systems): 1997 - 2001

Professional Services, Engagement Manager (3.5 years)

- Key point of contact for external clients requesting implementation and development work to the Tivoli Service Management suite of products. I was responsible for driving revenue, contract negotiations, resource allocation, deployment deliverables, technical reviews, implementations and managing 30+ billable resources.
- Successfully managed 40+ implementation projects (4 week to 3+ years) simultaneously while meeting requirements, budget, profitability, and deadlines throughout all phases of a project (scope to acceptance).
- Simultaneously managed three nationwide implementation projects over a two-year period which included deployments to 5,000 end-users.

Integration/Implementation Consultant (.5 years)

- Designed and implemented customized solutions for customer needs in cross-platform, client-server environments using a 4th generation language (KML) supporting all RDBMS.
- Created technical design documents that illustrated GUI interfaces, screen layouts, data schema and provided on-site implementation of code, training, and follow-up technical support.

USA Group (Sallie Mae): 1993 - 1997

Programmer/Systems Analyst

- Software development and implementation of a fee billing/accounting system (EAGLE II).
- Facilitated JAD sessions, refined business procedures, designed screens, reports, file specifications, and processing schedules according to customer specifications.
- Programmed online and batch programs which included screens, internal and external reports, database manipulation, and system balancing.

Wendi Mott

Voter Registration Subject Matter Expert

Wendi is a detail-oriented software quality assurance and business analyst with over ten years of experience in voter registration and campaign finance applications. She has been exposed to all aspects of the software development project life cycle. Wendi is organized and possesses good oral and written communication skills. Experience

Competencies

Quality Assurance and Testing

Database Design and Implementation

Training & Application Implementation

Customer Support

Help Desk

Education

BS in Apparel Merchandising, Indiana University

Quest Information Systems: 09/2004 – Present

Business Analyst/Quality Assurance Lead
FirstTuesday® - Indiana Statewide Voter Registration

- Ensured overall quality of the Indiana Statewide Voter Registration System.
- Oversaw System Testing and User Acceptance Testing, which involved the creation of over 700 test cases and scripts.
- Assisted in the application implementation of a statewide voter registration system.

Business Analyst/Quality Assurance Lead
Virginia Statewide Voter Registration

- Ensured overall quality of the project.
- Generated test plans to assist in internal testing as well as client testing.
- Wrote and executed over 200 manual test scripts/scenarios using design specifications, user requirements and meetings/discussions with the client. She notated test results and documented issues.
- Performed regression tests and worked closely with business analysts and developers to describe problems and suggest possible solutions or alternative measures for correcting problems.
- Served as liaison between the company and the client.

NSB Group, Inc: 03/1999 - 02/2004

Support/Business Analyst, Quality Assurance

- Provided support to end users on NSB Group, Inc.'s Planning and Allocation software.
- Identified, researched and resolved technical problems and assisted in application training and best practices.
- Responded to telephone calls, emails and personnel requests for technical support.

- Documented, tracked and monitored problems to ensure a timely resolution.
- Evaluated and tested NSB Group's Planning and Allocation software, programs against design specifications, user requirements and personal retail experience.
- Worked closely with developers to describe problems and suggest possible solutions or alternative measures for correcting problems.
- Created a static database to be used in automated testing.
- Generated test plans and scripts to allow for automated regression testing.
- Assisted in the writing and revising of specifications for new software programs.

Paul Harris Stores, Inc.: 10/1993 - 03/1999

Merchandise Planner/Distribution Manager

- Created merchandise plans, assortment plans and promotional and clearance strategies.
- Compared overall performance of a department with pre-determined criteria to maximize sales, margins and turns.
- Oversaw the distribution of a department's merchandise through direct reporting merchandise distributors.
- Worked directly with other merchandise planners and product development staff.

Kelly Sprague

Voter Registration Subject Matter Expert

Competencies

Project Management

Training & Application
Implementation

Customer Support

Help Desk

Education

Business and management
studies: Indiana University and
Indiana Vocational-Technical
College

Kelly is a detail-oriented Customer Support Consultant with over 20 years of experience in project management, sales, customer support, application development, quality assurance, documentation and presentation skills. She has a strong background in customer support with State and County government software in a broad assortment of applications. Kelly is organized and possesses good oral and written communication skills.

Experience

Quest Information Systems: 09/2004 – Present

Project Manager - Indiana Secretary of State

- Assisted in the application implementation of a statewide voter registration system.
- Helped defined system, implementation and training requirements.
- Oversaw several implementation activities and end user training.
- Coordinated the activities of five County Coordinators including the creation and execution of individual county implementation plans.
- Delivered end-user system training via classroom and Internet to accommodate various learning methods; created step-by-step user documentation.
- Continues to provide support and interface with county officials.

Business Analyst - IN DOE SIS Feasibility Study
- Assisted with the development of online surveys.
- Assisted with compiling and documenting survey results.
- Assisted with researching alternative solutions.
- Assisted with conducting phone interviews to other states and various Indiana school corporations.
- Assisted with the final Feasibility Study document, describing the possible approaches and recommendation of the feasibility study.

Manatron: 1988 – 2004

Consultant, Project Manager, County Government

- Served as project manager for Manatron's Visual Voter product that supported the county office of Clerk.
- Assisted in the application implementation and training of the county offices of Auditor and Treasurer.
- Duties included product design, presentation, contract activities, site analysis, conversions, software testing, documentation, implementation and user meetings. Supported additional software applications.
- Provided phone and onsite support to end users on the planning and installation of each application.
- Identified, researched, and resolved technical problems as well as assisted in application training and development of application best practices.

Carroll County Clerk's Office: 1983 – 1987

Deputy Clerk

- Oversaw Child Support, Small Claim filings and Voter Registration data entry.
- Handled daily bookkeeping and miscellaneous case filings, maintained and produced the Carroll County payroll, real estate transfers and tax billing data entry.

James Darragh, Ph.D.

Voter Registration Subject Matter Expert

Since joining GCR in 1997, Dr. Darragh has been responsible for designing and implementing multiple systems which address mission critical applications for both governmental as well as corporate interests. He has over thirty years of experience in the design of applications for a wide range of user requirements and has served as quality control manager on key projects. Dr. Darragh is a SharePoint user and an implementer and user of TFS and Visual Studio.NET. He has extensive experience with SQL server and imaging software.

- **Over 9 years hands-on experience working on Louisiana's election system, ERIN**
- **Has worked with the LA Secretary of State since 2005**
- **Designed the new ERIN system database, technical architecture, legacy data migration and validation, TFS development workflow and accounting system.**
- **Designed and implemented multiple systems for government entities**

Specific Project Experience

Project: Elections and Registration Information Network – ERIN

Description: ERIN manages all voter registration and election related tasks. The revised ERIN system is a technology update and redesign of the State's old AS400 system. Enhancements included process improvements and new features to address changes in Federal Law, reporting requirements, and broader accessibility to voter registration.

Application Type: SQL Server, .NET Win Form and Web Form applications.

Customer Type: State Government

Customer: Louisiana Secretary of State

Role/Responsibility: Project Role: Dr. Darragh was the project manager and principal system architect. He was a member of the requirements team that documented legacy system functionality and new ERIN system requirements. He designed the new ERIN system database, functional architecture, legacy data migration and validation, and startup procedures and system integrity validation. He managed the technical staff and oversaw the project quality control and testing, and was the principal communicator with the client.

Dates: July 2005 – Present

Technical Skills

Database Architecture and Design, Normalization, Program Architecture and Design, Object Oriented Design

Development Environment/Languages

SQL Server, Visual Basic .NET, Visual Basic, C, C++, Clipper, Novell

Education and Training

Ph.D., Mathematics, 1974
Northwestern University
Evanston, Illinois

B.A., Mathematics, 1967
California State University at Long Beach
Long Beach, California

Microsoft Trained in .NET development and OLAP

Darrin Snider

Business Analyst / Technical Writer

Darrin has twenty years of broad, overlapping experience in the IT industry including five years as a business analyst/project manager, five years as a network administrator, and ten years as a software developer. He has additional experience as a consultant (3 years), IT manager (5 years), and entrepreneur (2 years). His specialized experience includes customer resource management, sales force automation, marketing campaign automation, healthcare, new media production and education.
Experience

Quest Information Systems: 3/2013 – Present

Business Analyst

- Develop requirements for Statewide Voter Registration Web Services Framework and electronic pollbook interfaces
- Elicit requirements using interviews, document analysis, surveys, site visits, business process descriptions, use cases, scenarios, event lists, competitive product analysis, task and workflow analysis, and/or viewpoints.
- Work closely with development team and clients on proposed solutions. Monitor milestones and review deliverables.
- Key member of development team in designing and executing proof of concept for SharePoint-based legal tracking application for the State of Colorado. Managed development team, created proposal for final product, assisted with subsequent RFP

Galvin Technologies – 06/2012 – 01/2013

Business Analyst, Support Manager, Internet Marketing Specialist

- Create SEO-friendly content for client websites and social networks including ghost blog posts, tweets, news and press releases, Facebook posts, Linked-In forum participation, and blog commenting on related sites.
- Act as point of contact for all customer support calls. Manage client relationships. Coordinate all support-related projects through development and implementation.

ChaCha Search, Inc. – 06/2011 – 04/2012

Technical Business Analyst

Competencies

Business Analysis Skills

Requirements Definition

Requirements Documentation

Business Process Re-engineering

Project Planning

Project Management

Ad hoc reporting

Technical Writing

Development Technologies

SQL Server

ASP.NET

C#

Visual Basic

SharePoint

Server/Network Technologies

Windows Servers

Linux Servers

Cisco Routers and Switches

PIX Firewalls

PCI Compliance Regulations

Education

Indiana University - Bloomington, Indiana

Bachelor of Arts: Computer Science -- Concentrations in Information Systems Design, Project Management and Technical Writing.

Two additional years spent as Business/Finance Major.

- Worked with the product manager or project sponsor to document the product's vision and the project's scope.
- Wrote requirements specifications according to test-driven and behavior-driven (TDD / BDD) development standards using Cucumber / Gherkin.
- Key member of Powered By/Widget development team in design and specification of a portable applet for partner web sites.
- Served as key member of the implementation and quality team in support of ChaCha's integration with Dexetra's IRIS Android application. Made recommendations to content and engineering teams to improve performance and raise quality to meet user and business expectations.
- Managed affiliate traffic quality and made recommendations for site optimization and business process changes using metrics and thresholds taken from Adometry and Ominture for a ComScore Top 50 web site.

The Jackson Group - Integrated Marketing Communications: 08/2006 – 06/2011

Business Analyst / Project Manager, Technical Services Manager

- Work directly with clients during discovery phase of projects. Perform requirements gathering and workflow analysis. Map business rules against functional and business requirements. Set expectations and metrics for success criteria. Produce all design artifacts. Lead development of formal technical proposals for clients.
- Design and architect new software projects using use case/UML modeling in both Agile and RUP environments. Coordinate with programming team leaders to develop iterative production timelines. Ensure projects remain within scope and budget, meeting business requirements and success criteria.
- Designed and built a web-based ticketing application that stores venue configurations, event profiles, and schedules; allows general public to search and purchase tickets for events online; handles seat assignments; generates all event management reports; and integrates with existing ecommerce site. System is currently in use and processes orders for approximately 250,000 tickets over forty small-stadium events per season.

The 2MI Group – Custom Software Development: 05/2004 – 06/2006

IT Manager / Co-Owner

- Provided overall technical vision and strategy for a small startup company.
- Managed five-person in-house programming team as well as on-site and offshore subcontractors as needed.
- Designed, architected, prototyped, and managed development of a criminal case management system currently being used by multiple police departments and drug taskforces in the state of Indiana.
- Designed, architected, prototyped, and managed development of a criminal case management system currently being used by multiple police departments and drug taskforces in the state of Indiana.
- Designed, architected, and built web-based business management suite including calendar, contact manager, marketing campaign manager, project manager, time tracking, and other office communications systems.
- Key developer in project to build a web-based sales quote management system for a large nation-wide corporation.

Integrated Network Strategies: 05/2001 -- 05/2004

Consultant

- Supported clients as web developer, business analyst, custom application developer, and network administrator. Served as technical contact during all phases of the sales cycle, and provided all post-sales support.
- Designed and built time tracking and priority management software for national service organization.
- Designed and built open house web site for large realty organization.
- Designed and built youth sports on-line registration system for two local sports organizations.
- Designed and built custom functionality for IAS Visual AccountMate systems.

ConTech, Inc: 05/1999 – 05-2001

Systems/Network Analyst

- Responsible for all internal computer and network operations for company.
- Designed and developed in-house CRM, help desk, sales forecasting, and business management systems.

Suburban Health Organization: 02/1998 – 04/1999

Systems/Network Analyst

February 1998 - April 1999

- Administered three-site WAN and dedicated connections to partner hospital organizations.
- Helped to implement and integrate EDI system with existing data warehouse
- Developed ad-hoc reporting and analysis tools as needed.

Community Hospitals Indianapolis: 02/1996 – 01/1998

Server Support Analyst

- Responsible for server and desktop support for four servers and 125 users.
- Administered departmental data warehouse.

SayTech Corporation: 09/1992 – 02/1996

Software Developer

- Developed to specifications the first three versions of a remote multimedia training and presentation system.
- Designed, developed, documented, and maintained over 20 pre-packaged and custom software packages for the education market.
- Served as technical contact during all phases of the sales cycle, and provided post-sales technical support.

Matt Hazard

Voter Registration Subject Matter Expert

Matt is skilled in the development of usable and consistent documentation. He has comprehensive training in technical writing including developing online-help, user manuals, quick reference cards, technical marketing materials, training materials, internal communication and presentations.

Experience

Competencies

Technical Writing Skills
Technical and User
Documentation
Online Help and
Documentation Development
Training Development

Technologies

MS Word
SAP
RoboHELP
Adobe PageMaker
Adobe InDesign
Adobe Photoshop
Adobe Captivate
Microsoft Office
RWD InfoPak
RWD uPerform

Education

BA in Technical and
Professional Communication,
Cedarville University

Quest Information Systems: 11/2004 – Present

Technical Writer

- Developed technical documentation for the State of Virginia Statewide Voter Registration System

Roche Diagnostic: 6/2007 – 09/2010

Technical Writer

- Developed and maintained two large SAP help systems in InfoPak, each with more than 3000 task based documents (PSMs).
- Implemented RWD uPerform as a replacement for InfoPak.
- Trained users in the use of Infopak and uPerform.
- Redesigned Roche's PSM creation process to increase efficiency and usability.

IMA: 04/2007 – 05/2007

Technical Writer

- Created a Quick Start guide for a web application.
- Included both field level and task based information allowing users to be up and running as quickly as possible.

First Advantage: 11/2006 – 03/2007

Developer

- Developed a three-part comprehensive help system.
- Developed a training manual that walks users through basic functions of the software.
- Created a user guide that contained task based instruction for every task that could be completed with the software.

▪   Designed and wrote a context sensitive help system that contained field level content.

Forum Credit Union: 11/2004 – 11/2005

Technical Writer

▪   Created several video and text based user guides encompassing everything from using the software to installation tasks for the implementation team.
▪   Developed video tutorials for use as training material online help system.

Kristin Arabally

Business Analyst / Technical Writer

A member of the GCR staff since January 2009, Ms. Arabally has over thirteen years of enterprise level system/application experience in all phases of the System Development Life Cycle across a variety of roles including developer, business analyst, team lead, and tester.

- **Over 5 years hands-on experience working on ERIN**
- **Managed the TFS work item system on the ERIN project**
- **Assigned all tasks to developers on the ERIN project**
- **Documented the requirements for multiple large projects**

Education and Training

B.S., Business Information Systems, 2000
Taylor University
Upland, IN

Technical Skills

SQL Server, SQL Report Writer (SQR), Merant Tracker, Rational Suite, SELECT, Visio, XML, Java, WebSphere, Forte, Word, Excel, PowerPoint, Lotus Notes, ECS Monitor, C++, VB, COBOL, JCL

Specific Project Experience

Project: Elections and Registration Information Network – ERIN

Description: ERIN manages all voter registration and election related tasks such as poll lists, absentee voting, polling places, and election costs. This system began as a conversion of the state's large 20 year old AS400 system and has expanded in scope. The most recent enhancements have been related to voter facing websites and apps that provide a quick guide to voter information and election data. Some of the specific projects are as follows:

- Three similar websites were created that allow voters to register and make changes to their voter registration data online and to register to vote as an absentee. Each of these websites (online voter registration, online absentee request, and online Federal Post Card Application completion) interacts with the Office of Motor Vehicles (OMV) to retrieve the voter's driver's license record and signature image. If the user enters a specific set of personal data on the website and it matches the data on their OMV record – the system will complete a soft copy of the required registering paperwork and "sign" with their electronic signature images. The soft copy is made available for viewing within the ERIN voter registration application forms. These websites help to keep the Secretary of State's office current with the ability to do these types of things online, and helps to keep the Registrar of Voters (ROV) offices more paper-free.

- An election information notification service allows voters to sign up online to receive email notifications regarding election details (e.g. election reminders, polling place change notifications, etc).

- The Voter Portal enables voters to find answers to questions such as: Who is my registrar of voters? When is the next election? Where do I vote? What items will be on the ballot?

Application Type: SQL Server 2005, .NET Win Form and Web Form applications.
Customer Type: State Government
Customer: Louisiana Secretary of State
Role/Responsibility: Ms. Arabally manages developer workloads, prepares software design specification documents detailing how the application design would accomplish the client's functional requirements, and tests developer's work before sending it on to User Acceptance Testing. She has been involved in this capacity in nearly every large effort that the Secretary of State's office has introduced in the past 5 years.
Dates: January 2009 – Present

Mike Cameron

Technical Architect

Mike is an Architect/Developer/Database Analyst with a varied development background that includes using SharePoint Server 2007, SSRS, SSIS, Together Soft, Rational Rose, Dream Weaver, Java, JavaScript, JSP, C/C++, Visual C++, VB, VB Script, VB.NET, C#, ASP.NET, ASP, HTML, VSS, Subversion, Tortoise for SVN, Cold Fusion, SQL Server 2000/2005/2008, and Oracle. He has excellent communication skills, is a quick learner (able to quickly adapt to any situation/environment) and is able to quickly make sound technical decisions.

Experience

Quest Information Systems: 11/2013 – Present

Software Architect/Lead Developer

- Lead Architect and Project Leader for the Indiana and Virginia Statewide Voter Registration Systems
- Lead the Quest Development Team in the implementation of new tools and technologies
- Work with Executive and Services Delivery Management to develop and implement system enhancements to satisfy legislative and functional requirements of the States of Indiana and Virginia
- Identify opportunities to leverage technologies for the overall improvement of both Quest's and customers' applications and processes
- Work with external organizations to ensure their integration with key customer technology initiatives

Zotec Partners: 08/2013 – 11/2013

Product Support Team Lead/Developer

- Assisted with SQL Server upgrade migration project.
- Worked on updating stored procedures to remove hardcoded Server and Database names by implementing Dynamic SQL.
- Replaced embedded data sources with shared data sources in SSRS RDLs.
- Replaced hard coded Server and Database names by implementing Dynamic SQL in the embedded Datasets.
- Implement enhancement to Enterprise Win App implemented in WPF.

Competencies

Platforms

Windows 95/98/NT/2000/ XP/Vista/Server 2003/Server 2008, UNIX/LINUX

Software/Applications

Together Soft, Rational Rose, Tomcat, IIS, Share Point Server 2007, SQL Server Reporting Services (SSRS)

Development

Web Services (RESTful and XML), XML, C#, .NET 1.1, 2.0, 3.0, 3.5 & 4.0, Java Script, JQuery, JSON, HTML, DHTML, Cold Fusion, SOAP, Oracle, Oracle Designer 2000, JSP, C/C++, Java, JNI, JINI, RMI, WSS 3.0, MOSS 2007, Access, VB, VB Script, ASP, Adobe Photoshop, FrontPage 98/2000, JBuilder 4.0, MS Interdev, Dream Weaver MX, Cold Fusion Studio 4.5

Professional Affiliations

Vice President of Indiana State University's (ISU's) chapter of The Society of Physics Students Member of American Mathematical Association

Education

Indiana State University, Terre Haute, IN (05/98) Master Science - Math and Computer Science

Indiana State University, Terre Haute, IN (06/93) Bachelor Science PHYSICS

- Implement enhancements to .NET 2.0/4.0 Web Applications using JavaScript/AJAX/JQuery/JSON/C#/WCF

IU Health: 05/2011 – 08/2013

Senior Database Analyst/Developer

- Business/Technical Lead for a large team project dealing with Medicare data.
- Create/Manage the vision of future infrastructure/architecture of how technology is used to satisfy the growth of the department's business.
- Design and Implement SSIS packages to integrate data warehouse for clients.
- Support and enhance existing web application.
- Design and Develop new web applications and data bases.
- Communicate, Conceptualize, Design and develop new custom windows/console/Web applications in .NET 2.0/3.x/4.0 to accomplish tasks that other technologies cannot achieve.
- Design and develop new SSRS Reports and new Crystal Reports.
- Design and implement new client integrations and data migrations.
- Continuously writing queries to analyze PHI data to prepare reports.
- Manage the entire life cycle of projects.

Robert Half Technologies: 01/2011 – 05/2011

Consultant at IU Health

- Design and Implement SSIS packages to integrate data into warehouse for clients.
- Supported and enhanced existing web application.
- Design and implement new client integrations and data migrations.
- Continuously writing queries to analyze PHI data to prepare reports.

Strategic Data Management: 09/2009 – 11/2010

Consultant Development Manager

- Manage a team of developers.
- Created the development methodology and standards to obtain the business goals. Championed the cause for the technology team to achieve the goals set forth by executive management.
- Translated business goals and requirements into projects and identified mile stones the technology team needed to reach to satisfy those business goals.
- Primary software designer/architect for the team.
- Design BIaaS (Business Intelligence as a Service) Solutions using .NET and SharePoint Server 2007 framework.
- Build Custom Reports and KPI Dashboards
- Create Custom Web Parts and Custom .Net Libraries to add functionality to various portals
- Designed Database architecture for Diabetes portal, where patients can upload and track, and manage their data and collaborate with nurses and doctors who can also monitor patient data securely.
- Create and design custom themes and CSS layouts for clients portals
- Develop custom applications as a consultant to clients as needed
- Design application architectures for clients

- Implement Database designs for client custom data sources
- Design and use Project management portal in SharePoint for clients and for internal project tracking
- Served as a BA and DBA to analyze, Design and Implement a Data Migration project from 2 legacy systems to a data Warehouse using SSIS and then loaded data into Dynamics GP from data warehouse using SSIS and E-Connect SSIS Dynamics GP toolkit for a client
- Worked with Business and IT people in various locations and countries to gather requirements and understand the legacy systems and goals of project
- Designed/documented the data structure of legacy systems and data structure of Data Warehouse to document the proper data mappings to move legacy data into warehouse via custom SSIS package I developed
- Built the proper data mappings to move data from warehouse to Dynamics GP via custom SSIS package

Ivy Tech of Indiana: 04/2006 – 07/2009
Adjunct Faculty

- Teach Intermediate Algebra
- Teach College Algebra

Healthx Inc: 04/2006 – 07/2009
Developer II

- Support existing web portal apps. in .net 1.1/2.0/3.5/C#
- Design and implement new apps. for the web portal
- Design and implement new data validation win app. In C#/.net 2.0
- Designed and implemented a Rules Engine to make the data validation more robust and supportable for any data source
- Implemented various custom web controls and SSO services to work with various 3rd party web service vendors

Exact Target: 11/2004 to 4/2006
Developer

- Worked on the UI web application team. worked on CSApps development team to support production application
- Implement new interface requirements
- Bug fixes and implemented enhancements to existing features
- The web application was written with an n-tier architecture in asp.net and C#
- The creation and maintenance of cutting edge custom controls were a part of daily duties
- Work with SQL Server Reporting Services to implement and support middle tier/UI design to display cutting edge graphical web reports
- Work closely with the QA and customer support teams to solve customer problems and application bugs

Covance: 7/2004 to 11/2004

Contract Consultant

- Worked on a project to develop automated ECG analysis
- The application required the development of an algorithm that analyzed ECG's in drug studies
- The software made annotation marks on the wave forms at key points to produce data that identified highly sophisticated cardiologist recommendations that would normally be done by technicians before being formally reviewed by doctors
- Complete SDLC and full ER/ES & Part 11 validation documentation creation
- Several roles performed including business analyst, project management, senior level developer and team lead
- As a business analyst, created, prepared, coordinated and scheduled review meeting with key players to produce a professional grade set of part 11, ER/ES compliant documentation to validate the software being developed, while being responsible for delivering documentation with appropriate signatures and dates, defined by established software development processes

NorCam Systems: 10/2002 to 7/2004

Contract Consultant

- Held the responsibility of creating the Dev team and managing Dev team
- Created the application suite prototype in ASP
- Redesigned and implemented suite of applications in .NET 1.1
- Managed and led the technical team in Requirements gathering, design and development

QUEST
INFORMATION SYSTEMS

Cory A. Biggs

Senior Software Developer

Cory has over 11 years of application and website development experience. He has worked in all phases of the software development lifecycle, including requirements gathering, design, development, quality assurance, and support. He has strong technical skills, a great deal of business knowledge, and is an excellent problem-solver. He brings a long history of hard-work, dedication, and quality work to every project.

Experience

Competencies

Skills

Web Application Design and Development

Web Design and Development

Object-Oriented Design and Development

Web Services

Database Design and Development

Application Support

Reports Design and Development

Programming Languages

ASP.NET, C# .NET, HTML, SQL, T-SQL, JavaScript, PHP

Databases

SQL Server 2000, 2005, 2008

Development Technologies

ASP, .Net 3.0, 3.5, SQL Reporting Services, AJAX text

Certifications

MCP, MCAD, MCTS, MCPD

Education

B.S. in Computer Information Systems, Indiana University

B.S. in Operations Management, Indiana University

B.S. in Business Process Management, Indiana University

Quest Information Systems: 11/2004 – Present

Software Engineer

Indiana Election Division/Virginia State Board of Elections

- Development Team Lead for the FirstTuesday® statewide voter registration system
- Significant contributor to the management of statewide voter registration system development
- Provide quality assurance oversight during design process
- Develop web services to transfer information from state agencies
- Provide support for applications post implementation
- Create design documents for enhancement requests
- Design and develop reports for the statewide voter registration systems
- Improve system performance by use of updated SQL stored procedures

Indiana University Civic Leadership Development Club and Bloomington Montessori School: 10/2002 – 05/2004

Website/Database Developer

- Contributed to the creation of a website and database for elementary school that would allow administration to become more efficient, eliminate paperwork, and give parents more access to information
- Met with client to determine system requirements
- Designed and developed website using HTML and PHP as well as a database using SQL

Kevin Reid

Quest FirstTuesday® DBA

Kevin has successfully designed and implemented custom enterprise solutions for over 20 years. He has extensive experience with the software development lifecycle process including database technologies, architecture, development leadership and global deployment.

Experience

Quest Information Systems: 03/2000 – Present

Software Architect

Kevin provides technical support for multiple applications and customers including various Campaign Finance Projects as well as multiple state implementations of FirstTuesday®. He provides internal expertise for database performance tuning and programming.

Senior Software Engineer/Architect: 07/2004 - Present

- Architected, designed and implemented database model for a multiple state implementation of FirstTuesday® (statewide voter registration systems).
- Architected, designed and implemented a common database model for a multiple state implementation of FirstTuesday® (campaign finance systems).
- Architected, designed and implemented a common database model for a multiple county implementation of FirstTuesday® (electronic poll book).
- Architected, designed and implemented SSIS packages for external agency importing and exporting of data for external voter validation.
- Architected, designed and implemented SSIS packages exporting and importing of voter registration, absentee and signatures from our FirstTuesday® (statewide voter registration systems) to/from our FirstTuesday® (electronic poll book).
- Provided upgrade plans for upgrading the servers, SSRS, SSIS, SSAS objects from sql2005 to sql2008 and sql2008 to sql2012.
- Provides database performance tuning using SQL tuning methods and usage of sp_dm procedures.
- Setup and maintains SQL Transactional Replication from voter registration transactional database to reports database server for reporting and extracts.

Competencies

Programming Languages
T-SQL, PL/SQL, ASP, VB, C#, HTML

Databases
Microsoft SQL Server 2000, 2005, 2008, 2012, MS Access, Oracle 7, 8, 9i
Database Technologies
SSRS, SSIS, SSAS, Replication, Log Shipping, TSQL

Development Technologies
ASP, .Net 1.1, 2.0, 3.0, 3.5, Oracle Forms

Certifications

MCP

Education

BS in Electrical Engineering, Saginaw Valley State University

- Implemented SSAS cubes for application performance monitoring and Election Day reporting statistics.
- Implemented SSIS packages for daily batch processing of information and dba specific tasks.

RASK: 01/2006 – 01/2007

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled web data entry with synchronization of data with QuickBooks.
- Utilized SQL Server 2005, C# and windows services.

Landis & GYR: 10/2004 – 02/2006

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled a customer portal for the viewing of client data and test results.
- Designed and implemented a customized electronic configurator for ordering specific modeled equipment based on user selection components.
- Utilized Oracle 9i, .NET for Oracle data adapters and VB.Net

Rose-Hulman University**: 01/2004 – 07/2005**

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled students, professors and advisors to view, comment and track student project assignments and rubric results.

Noblesville Permits and Development**: 03/2003 – 02/2004**

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled county workers to submit and track inspections of building permits.

Indiana Election Division: **04/2002 – 02/2004**

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled election officials to set up campaign finance filing schedules for candidates and candidates to record financial information to automatically produce scheduled filing reports.
- Created data entry pages for third party data entry specialists for candidates who were required to have financial information recorded.   The application allowed for data entry based on filing documentation to extract the information from the filings to create financial information for auditing and filing purposes.

Rhode Island Election Division**: 10/2001 – 07/2003**

Senior Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled election officials to setup campaign finance schedules for candidates and candidates to record financial information to automatically produce scheduled filing reports. Automated the process of notification campaign fines based on late or unapproved filings.

Citizens Gas: 06/2001 – 09/2001

Software Engineer/Architect

- Designed and developed system architecture for an N-tier .Net application that enabled a customer portal for viewing human resource information.
- Utilized Oracle, .NET for Oracle data adapters and VB.Net

IndianaINTERNnet: 01/2001 – 06/2001

Software Engineer/Architect

- Designed and developed system architecture for an ASP Internet application that allowed students looking for internships to post resumes on their portal page and allow potential employers to search for specific matches based on job criteria, locality and school schedule.

iProperty: 05/2000 - 12/2000

Software Engineer/Architect

- Developed an ASP Internet application for potential home buyers to create a personal portal to search and communicate with realtors regarding home viewing and purchasing.

Dow AgroSciences : 02/1993 – 02/2000

Programmer/Developer

- Provided technical support for multiple applications and technologies that provided ability of global research scientists to run field trial studies to collaborate data with co-workers for analysis and FDA submissions.
- Created and maintained a custom Oracle Forms application for lab project time tracking and deployed globally using a Citrix client.
- Created and maintained a custom database archival solution storing data from global individual field trial systems so that data could be extracted for efficacy reporting across multiple research criteria.

B. Experience of the Consultant (SCORED)

1. Consultant and Subcontractor Relevant Experience

As outlined above in section 3.3 A1 and 2, Quest and GCR staff have extensive experience in voter registration and election systems in a variety of states. We work with state and local officials and staff to continuously improve those systems and process. We have included the following table which succinctly presents key project staff attributes: name, relevant experience, role, responsibilities and experience both career and relevant voter registration experience.

Name	Relevant Experience	Role	Project Responsibilities	Career Experience/VR Experience
Sean Fahey	Indiana Statewide Voter Registration System Virginia Election and Registration Information System	Service Delivery Manager	Program Management, Customer relationship/satisfaction; services delivery	20/6
Jim Stewart	Indiana Statewide Voter Registration System Virginia Election and Registration Information System Campaign Finance State Systems (CO, IN, RI, ME, AL)	Project Manager	Project Management & oversight for deliverables; resource management; services implementation	20/7

Wendi Mott	Indiana Statewide Voter Registration System Virginia Election and Registration Information System	Voter Registration Subject Matter Expert	OSOS and county user business process analysis, workflow analysis	19/10
Kelly Sprague	Indiana Statewide Voter Registration System Virginia Election and Registration Information System	Voter Registration Subject Matter Expert	OSOS and county user business process analysis, workflow analysis	20/10
James Darrah, Ph.D.	Louisiana Elections Registration & Information Network	Voter Registration Subject Matter Expert	OSOS and county user business process analysis, workflow analysis	30/9
Kristin Arabally	Louisiana Elections Registration & Information Network	Business Analyst/Technical Writer	Business analysis and documentation	13/5
Darrin Snider	Indiana Statewide Voter Registration System	Business Analyst/Technical Writer	Business analysis and documentation	20/2
Matt Hazard	Virginia Election and Registration Information System	Business Analyst/Technical Writer	Business analysis and documentation	10/2

Mike Cameron	Indiana Statewide Voter Registration System	Technical Architect	System architecture design review and documentation	20/2
Kevin Reid	Indiana Statewide Voter Registration System Virginia Election and Registration Information System	Quest FirstTuesday® DBA	Database design review and documentation	20/14
Cory Biggs	Indiana Statewide Voter Registration System Virginia Election and Registration Information System	Senior Software Developer; Team Lead	Application technical design review and documentation	12/10

2. Other Relevant Experience

Quest and GCR have deep experience in mission-critical IT endeavors in the public and private sectors. In addition to designing, developing, implementing and managing statewide voter registration systems in Indiana, Louisiana and Virginia as well as campaign finance systems in Alabama, Colorado, Indiana, Maine, Oklahoma and Rhode Island, Quest designed and implemented motor vehicle systems in Indiana, Louisiana and South Dakota as a partner with Unisys Corporation. This experience allows Quest to bring a unique perspective to the OSOS Elections Analysis and Business Requirements project. We understand the challenges, complexities and realities of large IT projects conducted on behalf of state government agencies.

Quest provided key contributors to the Indiana BMV's strategic information technology study performed in 1998. This study was used to review potential directions for the replacement of their IT systems and to estimate the implementation and on-going costs for each potential direction. The study lead to the legislature

funding a seven-year project to replace all IT systems of the Indiana BMV. Today, the Indiana BMV has successfully completed the implementation of all key systems and is leveraging the capabilities of the new systems to implement new business practices.

Quest's CEO, Steve McNear, chaired an IT subcommittee as part of a government efficiency commission for the State of Indiana. The Information Technology Working Group (ITWG) of the General Government Subcommittee of the Indiana Government Efficiency Commission was to evaluate the efficiency of all state funded agencies, departments and programs to make recommendations to improve efficiency and reduce waste or costs. ITWG was also charged with highlighting cases which might serve as models for the enterprise application of IT as well as examples of how individual agencies can utilize new information technology solutions to improve their efficiency, make their people more productive and connect citizens directly to government services. ITWG members focused the group's efforts on key strategic issues which would have the most significant long-term impact. ITWG volunteers contributed hundreds of hours and made numerous sacrifices to contribute to improving the strategic and tactical operation of Indiana state government. Several innovations emerged from the feasibility study and Indiana Government is still implementing their recommendations today.

3. Related Contracts and Experience

Include a list of contracts the Consultant has had during the past 5 years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/email addresses.

Contract	State of Indiana – Voter Registration
Reference number	67994-14; D2-3-13A Renewal: EDS #: D2-3-13A
Contract period of performance	2004 - present
Contact person	Brad King, Co-Director, Indiana Election Division
Telephone number	317-233-0929
Fax number	317-234-2996
Email address	bking@iec.IN.gov

Contract	Commonwealth of Virginia – Voter Registration
Reference number	VA-0813201-Quest
Contract period of performance	2004 - present

Contact person	Matt Davis
Telephone number	804-864-8905
Fax number	804-864-8905
Email address	Matthew.davis@sbe.virginia.gov

Contract	**State of Alabama – Campaign Finance**
Reference number	PO #: 3475125
Contract period of performance	2012 - present
Contact person	Adam Thompson, Deputy Chief of Staff, SOS Office
Telephone number	334-353-7818
Fax number	334) 242-4993
Email address	Adam.thompson@sos.alabama.gov

Contract	**State of Colorado – Campaign Finance**
Reference number	#09VAA00010
Contract period of performance	2008 - present
Contact person	Steve Bouey, Assistant Director of Elections
Telephone number	303-869-4939
Fax number	303-869-4861
Email address	Stephen.bouey@sos.state.co.us

Contract	**State of Indiana – Campaign Finance**
Reference number	EDS #: DS-5-14
Contract period of performance	2006 - 2015
Contact person	Brad King, Co-Director
Telephone number	317-233-0929
Fax number	317-234-2996
Email address	Brad.king@iec.IN.gov

Contract	**State of Maine – Campaign Finance**

Reference number	NO 94E-20121115000000001936
Contract period of performance	2002 – present; upgrade project 2013 - 2014
Contact person	Paul Lavin, Assistant Director of Elections
Telephone number	207-287-3024
Fax number	207-287-6775
Email address	Paul.lavin@maine.gov

Contract	**State of Rhode Island – Campaign Finance**
Reference number	
Contract period of performance	2001 - present
Contact person	Richard Thornton, Assistant Director of Elections
Telephone number	401-222-1907
Fax number	401-222-3135
Email address	Rthornton@elections.ri.gov

Contract **	**State of Louisiana – Voter Registration**
Reference number	OCR# 139-300131
Contract period of performance	5/1/2013-4/30/2015
Contact person	Scott Mayers
Telephone number	(225) 922-0626
Fax number	(225) 922-2003
Email address	scott.mayers@sos.la.gov

** - GCR reference

Other contracts outside the 5 years that also reflect Quest's experience and ability to meet the requirements of the RFP:

Contract	State of Washington DOL
Reference number	KK247
Contract period of performance	2008 (3/31/08 – 7/22/08)
Description of Project	Washington Data Acquisition & Management Practices

Contract	State of Washington DOL
Reference number	K227
Contract period of performance	2007-2008 (11/19/07 – 2/20/08)
Description of Project	Washington DOL (Department of Licensing) Feasibility Study

Contract	State of Indiana, Department of Education
Reference number	MSA #415 – SOW #1
Contract period of performance	2008- 2009 (10/27/08 – 03/03/09)
Description of Project	IN DOE (Department of Education) Feasibility Study (for a statewide student information system)

C. References (SCORED)

List three references:

REFERENCE #1	
Contracting Agency/Entity Client Name:	Commonwealth of Virginia State Board of Elections
Contact Name:	Matt Davis
Contact Title:	IT Services Manager
Description of Role / Responsibility the above contact person had in referenced contract work:	On-going oversight and management of technical aspects of the VERIS voter registration system. Primary contact for the Quest support team. Mr. Davis was not involved in the original implementation project. All personnel involved in the original implementation project have since left the Virginia State Board of Elections, including the Secretary.
Contact Phone Number:	804-864-8905
Contact Email Address:	Matthew.Davis@sbe.virginia.gov
Applicable Dates of Contract Work	December 2004 – Present Includes assumption of prime contract from Unisys for post-implementation support & maintenance plus an annual renewal of the support contract.
Description of Role / Responsibility in referenced contract work:	Partner with Unisys Corporation responsible for: • Customization & implementation of Quest FirstTuesday® HAVA-compliant SVRS [VERIS] • Provide Tier 3 application support • Training • Data conversion of historical data • Manage all above components through life of contract • Data conversion from mainframe database • Manage application software & database through life of contract • Manage enhancements & 2 annual software releases

REFERENCE #2	
Contracting Agency/Entity Client Name:	Indiana Secretary of State Office Voter Registration & Campaign Finance
Contact Name:	Brad King
Contact Title:	Co- Director, Indiana Election Division
Description of Role / Responsibility the above contact person had in referenced contract work:	On-going oversight and management of the Statewide Voter Registration and Campaign Finance Reporting Systems; acts as the Primary contact for the Quest support team.
Contact Phone Number:	(317) 232-3939
Contact Email Address:	bking@iec.IN.gov
Applicable Dates of Contract Work	2004 – Present
Description of Role / Responsibility in referenced contract work:	Since 2004, Quest has worked effectively with the State of Indiana, Secretary of State Office and the Indiana Election Division, to manage the State's Voter Registration and Campaign Finance Reporting Solutions (including Absentee Voting and Lobbyist and Election Reporting Solutions). Quest has an on-going support contract with the State for: • Customization & implementation of Quest's FirstTuesday® Campaign Finance solution • Provide Tier 3 application support • Training • Manage all above components through life of contract • Manage application software & database through life of contract • Manage enhancements & software releases • Proficiency Management Program

REFERENCE #3	
Contracting Agency/Entity Client Name:	Louisiana Secretary of State
Contact Name:	Scott Mayers
Contact Title:	Director of Information Technology
Description of Role / Responsibility the above contact person had in referenced contract work:	IT Director responsible for managing the contract work, approving requirements and system design decisions. On-going oversight and management.
Contact Phone Number:	(225) 922-0626
Contact Email Address:	scott.mayers@sos.la.gov
Applicable Dates of Contract Work	Current Contract Reference Number: OCR# 139-300131. Period of Performance: May 1, 2013 – April 2013 Initial Contract for this Work began July 2005.
Description of Role / Responsibility in referenced contract work:	Prime contractor responsible for: • Continued development of the Elections Registration and Information Network (ERIN) application including .NET programming, business analysis, and SQL Server support. • Planning, design, programming/development, data integration, configuration, installation, problem resolution, analytical services for continued system improvements. Identification, assignment and oversight of all work necessary for the successful completion of tasks identified by the Department that support its mission, whether performed by Department or contractor personnel.

D. Related Information (MANDATORY)

1. Neither the Consultant nor the subcontractor have contracted with the State of Washington during the past 24 months. While not within the last 24 months, Quest has previously provided Washington DOL Feasibility Study (RFQQ-K227 - 11/19/07 – 2/20/08) and Washington DOL Data Acquisition and Management Practices (RFQQ-K247 (3/31/08 – 7/22/08).
2. Neither the Consultant nor the subcontractor staff was an employee of the State of Washington during the past 24 months or is currently a Washington State employee.
3. The consultant has not had a contract terminated within the last 5 years.
4. N/A based on response to #3 above.

3.3   E   OMWBE Certification (Optional)

There is no minority-owned or women-owned participation in this proposal.

3.4 COST PROPOSAL

A. Identification of Costs (SCORED) (Deliverables)

In the table below, we have summarized project investment by deliverable. Upon completion and acceptance of a deliverable, Quest will invoice OSOS with net 30 terms. We understand OSOS requires a 20% holdback which we have factored into the value of the final deliverable. After final acceptance of deliverable D5, we would expect payment of the total cost of D5 and the full amount of all holdbacks within 30 days.

Deliverable Costs

Deliverable	Primary Contractor	Sub-Contractor	Total Cost
D1: Project Plan Work Package	$20,000	$0*	$20,000
D2: Initial Requirements Documentation	$18,820	$12,180*	$31,000
D3: Current State – Business Process Documentation & Review	$111,680	$28,320*	$140,000
D4: Future State – Business Process Documentation & Review	$76,776	$23,760*	$100,536
D5: Final Delivery & Presentation(s)	$2,850	$2,150*	$5,000
D6: Weekly Project Status Reports	$0	$0*	$0
			$296,536

*Estimated Sub-Contractor costs based on proposed timeline and tasks.

In summary, we are confident Quest is highly qualified to achieve the desired results of the OSOS Elections Analysis and Business Requirements project. Further, the breadth and depth of Quest's relevant experience meets or exceeds the requisite qualifications described in the RFP. The Quest team has successfully performed the exact tasks called for in the RFP for 3 states whose statewide voter registration systems have excelled at their mission based on the Quest team's foundational work as well as the ongoing management of the systems.

We look forward to working with OSOS to further mutual understanding of project requirements and Quest's qualifications in order to envision and document a system that exactly meets the OSOS' needs.
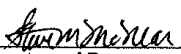
~ The Quest Team

Attachment A

EXHIBIT A

CERTIFICATIONS AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):
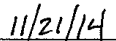
1. I/we declare that all answers and statements made in the proposal are true and correct.

2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.

3. The attached proposal is a firm offer for a period of 120 days following receipt, and it may be accepted by OSOS without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 120-day period.

4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)

5. I/we understand that OSOS will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of OSOS, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.

6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.

7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.

8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

_____
Signature of Proposer

_____CEO_____   ___11/21/14___
Title   Date

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Attachment B

Quest Information Systems, Inc.

1. Name/ address/phone/fax/signing authority of legal entity:

    Quest Information Systems, Inc., has its principal place of business at:
    8720 Castle Creek Pkwy E DR, Suite 231, Indianapolis, IN 46250-4315
    Phone: 317-806-8800; fax: 317-806-8800
    Contract signing authority: Steve M. McNear, CEO, smcnear@questis.com

2. Name/address/phone of Principal Officers:

    Steve M. McNear, CEO, address as above; phone: 317-806-8821.

    Sean Fahey, President, address as above; phone: 317-806-8831.

3. Legal status of Consultant/year established:

    Quest is a C Corporation, established December 29, 1989.

    Washington Uniform Business Identification (UBI) # issued by the Department of Revenue:

    UBI #: 603-454-203.

4. Federal Employer Tax Identification (EIN) number:

    EIN #: 35-1785895.

5. Location of the facility from which Consultant would operate:

    Quest Information Systems, Inc. operates from its headquarters location in Indianapolis, IN, as listed above. Management, consultants and other team members will be on-site in Olympia, WA, as required, to perform the deliverables and execute the plan as outlined in the Quest response.

6. Identify any (Washington) state employees and/or governing board members:

    Quest has no State employees or former State employees employed, or on the firm's governing board, as of the date of this proposal.

GCR Inc.

1. Name/address/phone/fax/signing authority of legal entity:

   GCR Inc. has its principal place of business at:
   2021 Lakeshore Dr., Ste. 500
   New Orleans, LA 70122
   Office Phone: 504.304.2500 | Toll-free: 800.259.6192 | Fax: 504.304.2525

   Contract signing authority: Todd C. Bouillion, CIO/Vice President,
   tbouillion@gcrincorporated.com

2. Name/address/phone of Principal Officers:

   Contact address and phone number for all officers:
   2021 Lakeshore Dr., Ste. 500
   New Orleans, LA 70122
   Office Phone: 504.304.2500

   Names and home addresses of GCR Inc. Principal Officers:

   Michael W. Flores, P.E., President, Director
   434 Lakeshore Parkway, New Orleans, LA 70124

   Gregory C. Rigamer, Director/Officer
   110 Bellaire Street, New Orleans, LA 70124

   Dan Cox, Chief Executive Officer
   2021 Lakeshore Drive, New Orleans, LA 70122

   James Andersen, Vice President, Director
   1445 East Putnam Avenye, Old Greenwich, CT 06870

   Paul Caliento, Treasurer, Director
   1445 East Putnam Avenye, Old Greenwich, CT 06870

   Mathias Rumilly, Secretary, Director
   1445 East Putnam Avenye, Old Greenwich, CT 06870

   Joseph Posewick, Director
   1140 Hickory Creek Drive, New Lenox, IL 60451

   Angele C. Romig, Vice President
   45 Allard Boulevard, New Orleans, LA 70119

   Phillip D. Brodt, Vice President

7 Spanish Moss Court, Mandeville, LA 70471

Todd Bouillion, Vice President
8025 Elizabeth Lane, Mandeville, LA 70448

3. Legal status of Consultant/year established:

GCR, Inc. is a _Louisiana__ Corporation, established in 1979.

Washington Uniform Business Identification (UBI) # issued by the Department of Revenue:

603 144 104

4. Federal Employer Tax Identification (EIN) number:

EIN #: 720852541

5. Location of the facility from which Consultant would operate:

GCR, Inc. operates from its headquarters location in New Orleans, Louisiana, at the address listed above. Management, consultants and other team members will be on-site in Olympia, WA, as required to perform the deliverables and execute the plan as outlined in the Quest response.

6. Identify any (Washington) state employees and/or governing board members:

GCR, Inc. has no State employees or former State employees employed or on the firm's governing board as of the date of this proposal.